insightexpress

discover tomorrow, today®

Client Handbook

This manual is to be used as a reference guide for all InsightExpress platform users.

Table of Contents

A. WELCOME

When it comes to marketing research, you're comfortable taking the lead. Whether you prefer to work independently or are simply looking to economize, the InsightExpress research platform can serve as a powerful and efficient ally.

Since opening our doors in 1999, InsightExpress has offered its clients superior online marketing research services. The InsightExpress research platform provides the most robust, inventive, and advanced survey capabilities available – all at a reasonable cost.

What sets us apart? While exceptional technology is the backbone of sophisticated online research, our system was designed by researchers—not technologists. As researchers, we understand that it's important to adhere to industry standards and we are able to provide the highest quality tools available. We draw upon proprietary expertise in both research and technology to help you achieve your research goals quickly, independently, and with confidence.

InsightExpress puts this patented research engine at your fingertips so you can work faster and manage your own timeframe, delivering top quality results to your clients and internal stakeholders. We not only provide an exceptional tool, but also a seamless experience from start to finish. Every stage of the process, from survey development through data collection and top notch reporting, was designed with ease and excellence in mind.

But we think of our platform as more than an accessible and reliable resource – our own analysts and researchers put it to use on a daily basis. As both power users and tough customers, we are constantly challenging ourselves to find new ways to make a great thing even better.

This intuitive, accessible user manual was developed to arm our clients with a comprehensive and searchable guide to our research platform. It contains step-by-step instructions, visuals, and examples which will help you successfully create, share, launch, and analyze your surveys.

We hope you enjoy your research experience with InsightExpress.

Thank you for choosing us as your research partner.

Sincerely,
The InsightExpress Team

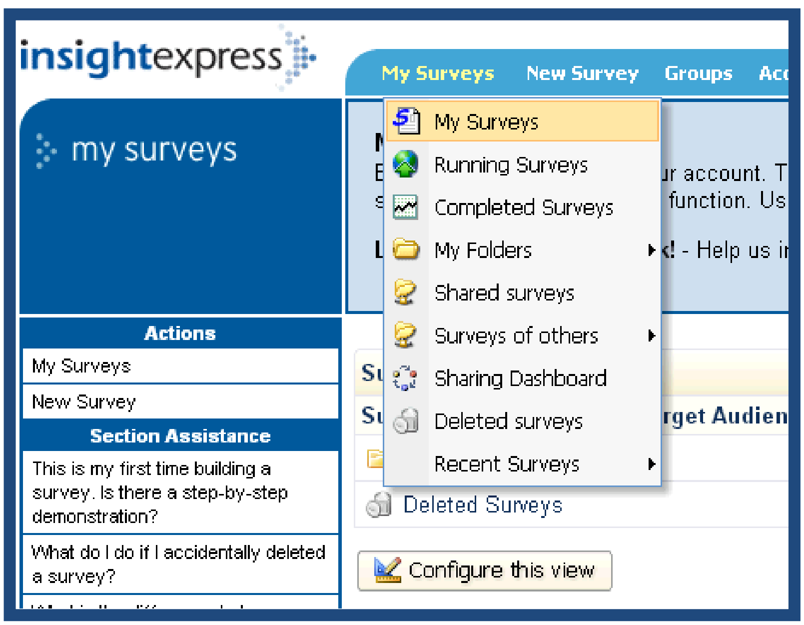
B. ACCOUNT NAVIGATION

1. ACCOUNT TOOLBARS

When you log into your account, you will see many toolbars that will assist you in creating and fielding your survey.

a. My Surveys Menu

The My Surveys tab at the top of the page allows you to go through all of the surveys that you have in your account as well as access those surveys that are shared with your account.



My Surveys: Brings you back to the **My Surveys** page regardless of where you are in your account.

Running Surveys: Will display all surveys within your account that have been made live. For more information regarding making your survey live, please refer to page **101.**

Completed Surveys: Will display all surveys within your account that are closed.

My Folders: Allows you to view all surveys within your account in a single view, as well as any folders that you have been created.

Shared Surveys: Allows you to access the surveys that were shared **directly with your account.** Please see the **Groups and Sharing** section on page **115** for additional information.

Surveys of others: Allows you to access the surveys that were **shared with groups that you are associated with.** Please see **Creating a Group** on page **112** for additional information on survey sharing groups.

Sharing Dashboard: Allows you to view the survey groups that you belong to as well as any survey

permissions that you have granted to other InsightExpress users.

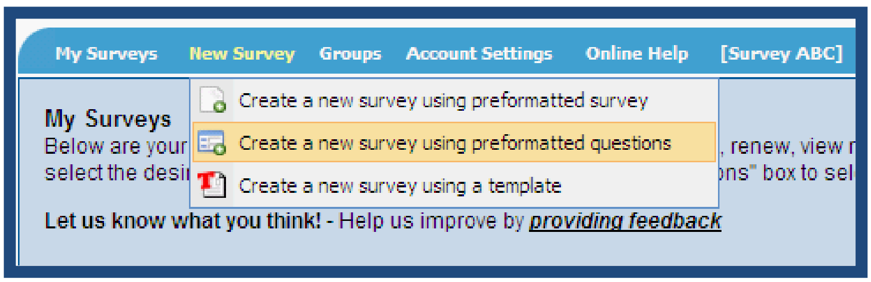
Deleted Surveys: Allows you to access surveys that you have deleted.

Recent Surveys: Allows you to access surveys that you have recently edited or analyzed.

Please note: there is a context-sensitive **Section Assistance area on the left-hand side of every page within the platform to address most frequently asked questions*

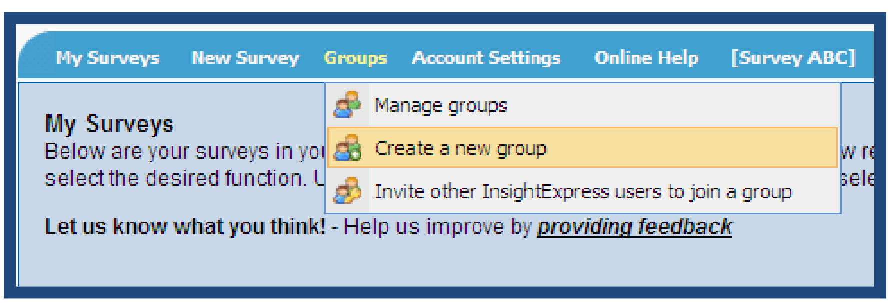
b. New Survey

The New Survey tab at the top of the page allows you to create new surveys from 3 different options. Please refer to **Survey Creation Methods** on page 8 for additional information.



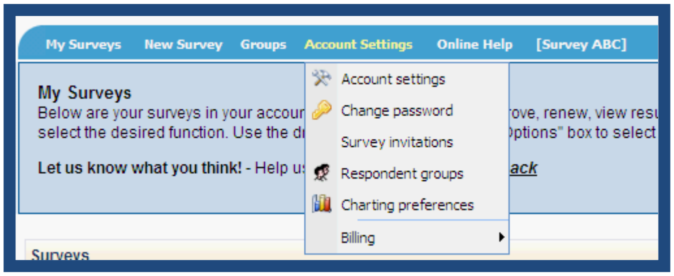
c. Groups

By creating a group, you can invite other InsightExpress users to see and modify surveys, view results online, download results, and change the reporting options of surveys in your account. Please refer to **Groups and Sharing** on page 112 for additional information.



d. Account Settings

The Account Settings tab will provide a number of ways to customize your account.



Account Settings: Allows users to adjust several advanced features within their account.

Change password: Allows you to change your account password.

Survey invitations: You may add an invitation to a survey that is being fielded to your own respondent list. Create the language of the invitation, accept and reject labels and add a reject URL for your survey invite.

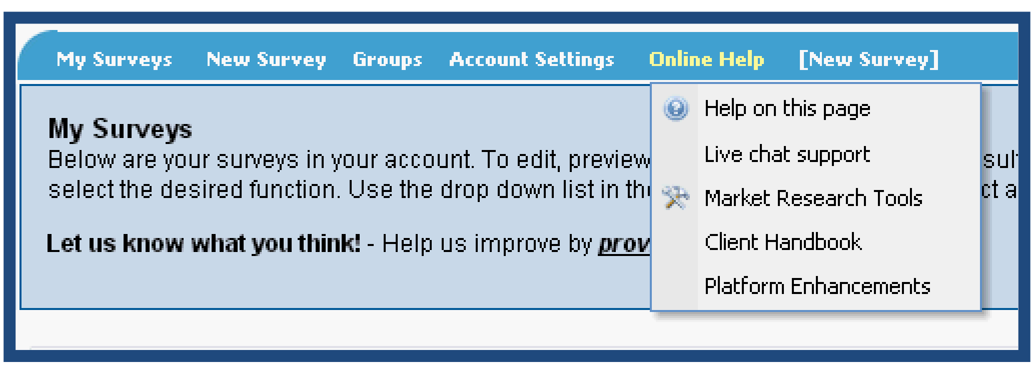
Respondent groups: Supply a list of usernames and passwords for all respondents for a survey. Simply copy and paste a list of usernames and passwords to add extra security to your survey. For more assistance on this process, please contact InsightExpress Support at support@insightexpress.com.

Charting preferences: Allows you to modify the charting views for your survey results.

***Mailing Batches / Custom Mailings**: Allows users to e-mail survey invitations directly to an opt-in e-mail list of up to 2000 addresses from within an InsightExpress account
To use this feature, please contact your Account Executive for information on additional training and support materials.

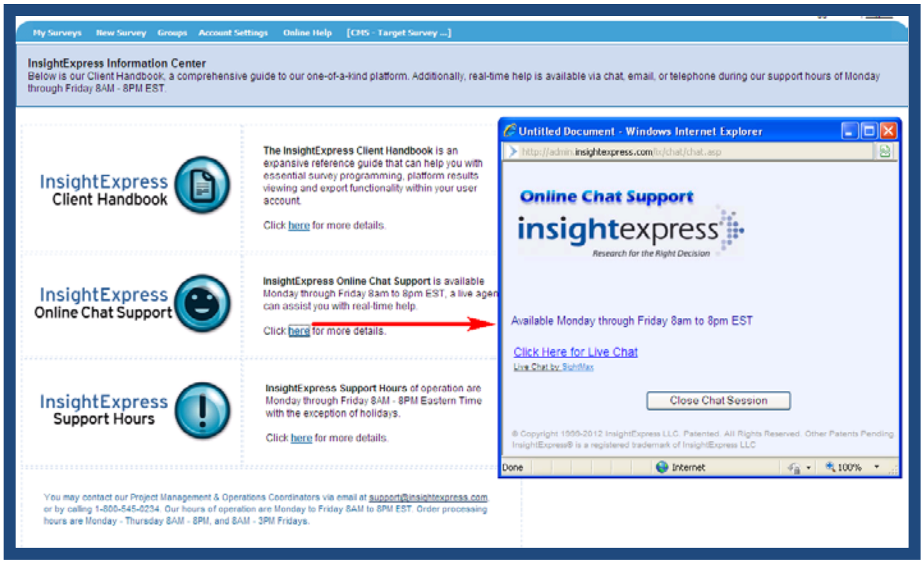
Billing: Allows you to change your billing information, view payment methods, and monitor billings for your account.

e. Online Help



Help on this page: This will link you to InsightExpress' electronic Client Handbook or to the live chat support tool.

Live chat support: This will connect you to a live Custom Marketing Research Coordinator (Support hours are 9am—8pm EST)



Market Research Tools: Allows you to search for the most recent marketing research terminology and calculators.

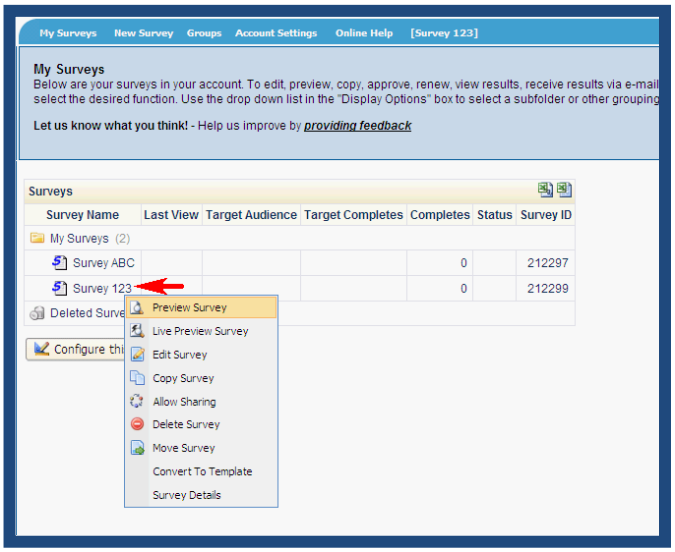
Client Handbook: Allows you to open the Client Handbook from the site.

Platform Enhancements: This section details our most recent platform enhancements.

2. MY SURVEYS

Once logged in, the first page you will see is entitled “My Surveys**”**. This page lists all surveys that have been created in your account (or surveys that have been made available to you though a shared group).

By clicking on the name of the survey, you will see the following options: **Preview Survey, Live Preview, Edit Survey**, **Copy Survey**, **Allow Sharing**, **Delete Survey**, **Move Survey**, **Convert to Template**, and **Survey Details.**



Preview Survey: Allows you to view your survey while in editor mode. This preview method provides you with an additional toolbar, allowing you to skip to any question within your survey at any time. You may also enter the edit page of any question directly from the preview page by selecting the icon to the left of the question you would like to edit.

***Please Note:** This preview method will not show the thank you page at the end of your survey preview.*

Live Preview: Allows you to preview both the survey and thank you page as a respondent will see it.

Edit Survey: Links to your survey’s Sequence Questions page while your survey is in edit mode. Once your survey is running, you will only have access to edit the thank you and not running messages.

Copy Survey: Duplicates the survey selected.

Allow Sharing: Allows other IX account holders to view the survey under specific permissions. Refer to **Survey Sharing** on page **115** for survey sharing details.

Delete Survey: Moves the selected survey to a folder of deleted surveys.

Move Survey: Will move the selected survey into a new or existing folder.

Convert to Template: Allows you to customize and create your own survey template including logos, color background and fonts for later use on future surveys.

Survey Details: Provides approval details of the selected survey including the preview/live-preview

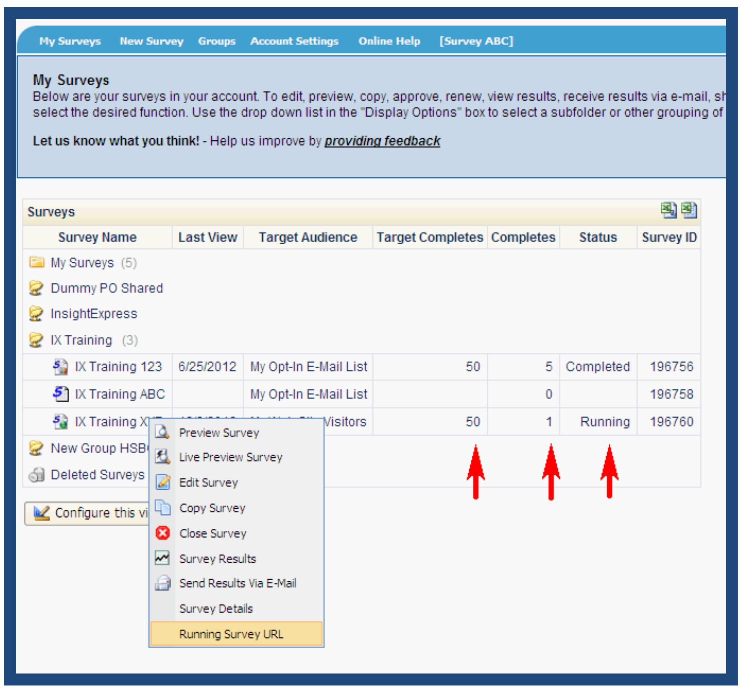
URL, survey owner, target audience, target/collected completes, payment method information, and the date that the survey was created.

Running Survey URL: While your live survey URL will be emailed to you once your survey has been processed, you may also access the URL of any live survey by selecting "Running Survey URL".

Close Survey: When launching a survey, you will be asked to specify that survey's target completes. This is the number of completes that your survey must collect before automatically closing. However, if you would like to close your survey prematurely, you may select "Close Survey" to do so. When closing your survey, you will have the option to either close your survey instantly or set a specific date and time when you would like it to close.

**Please Note: When a survey is closed prematurely, any unused target completes will be returned back to the payment method for future use.*

The following screenshot shows the "Survey Results" option which is available after a survey is approved and has collected its first complete. Refer to section **F-Survey Results Interpretation** on page **121** for detailed instructions.



Target Completes: This is the number of completes your survey must collect before automatically closing. If you would like to close your survey prematurely you must left-click your survey and choose "Close Survey". As stated above, when a survey is closed prematurely any unused target completes will automatically be returned to the payment method for future use.

Completes: This is the number of respondents who have completed your survey.

Status: This will indicate whether your survey is **"**running" (collecting completes), or "completed**"** (target completes reached/survey closed).

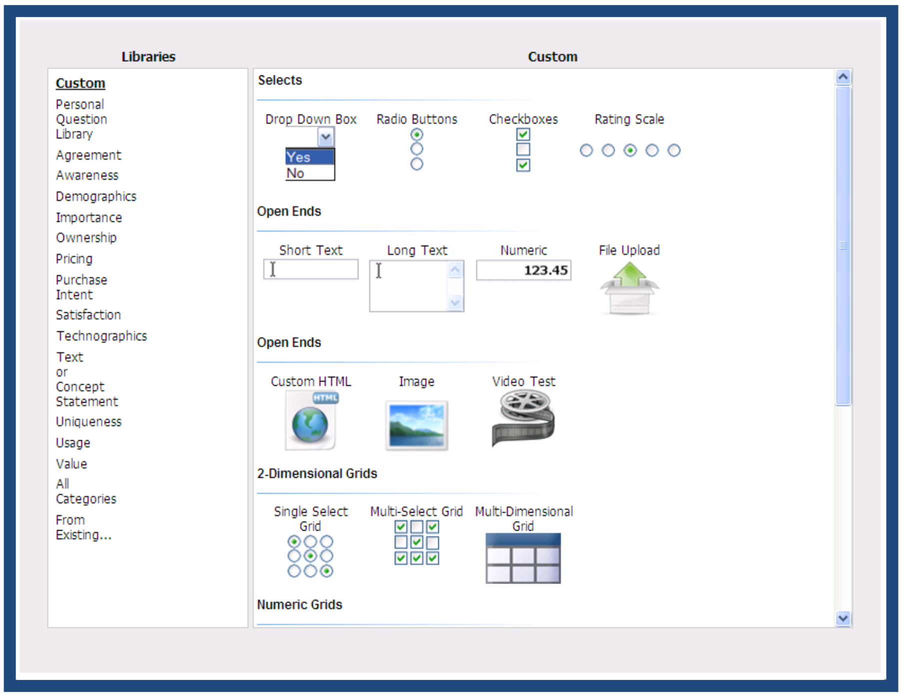
**Please note: Surveys not yet launched will not display a status. Once a survey has been launched, you may not make any structural changes.*

C. SURVEY CREATION

1. SURVEY BUILD BEST PRACTICES

a. Query Strings

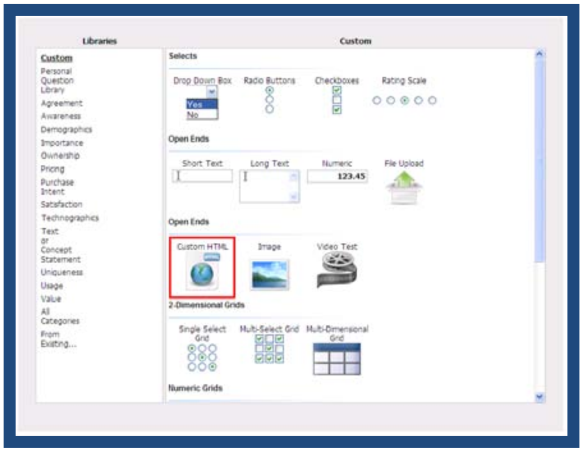
Query Strings are hidden survey questions that allow you to capture personally identifiable information (PII) from internal audience members. To ensure proper data collection InsightExpress recommends inserting all query strings at the beginning of your survey. Please refer to **Query Strings** on page **49** for more information.



b. Intro Statements

When fielding your survey, it is customary to provide an introductory statement to thank respondents for their time while giving them a brief description of the survey they are about to take.

To insert an introductory statement or section header into your survey, create a new **Custom HTML** question. Then, simply add your text into the “Question Text” box provided. For more information about this question type, please refer to page **32**.

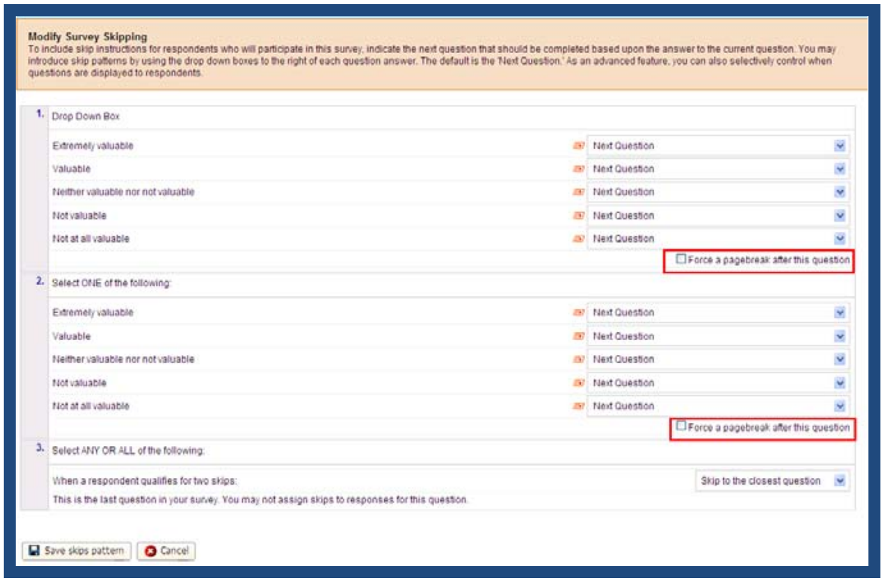


c. Page Breaks

Please note: InsightExpress recommends adding page breaks every 1-3 questions.

Page breaks help to ensure good data collection and prevent excessive respondent scrolling. Often times, when a page is too long, a respondent may *not* notice error messages above questions. As a result, many respondents may exit a survey prematurely, having not noticed any error messages displayed on the page.

To add a single page break after a particular question, left-click that question and choose "Skips, Scripts & Page Breaks". On the following page, select "Force a pagebreak after this question." Saving this change will add a single page break after that particular survey question. To add multiple page breaks at one time, simply click on "Skipping & Page Breaks" under the logic toolbar on the main editing page of your survey. From here, you will see a box to the bottom right of each survey question where you can check off "Force a page break after this question." Add the breaks after roughly every 1-3 questions, scroll to the bottom of the page and click "save." (Please see below for clarification):



d. Allowing Respondents to Take Survey Multiple Times

By default, InsightExpress surveys allow respondents to take a survey only once. If you would like your respondents to be able to take your survey multiple times, you will need to modify the URL before you send it out. To do so, follow these simple steps:

1. Launch your survey. (For more information on this step, please refer to the **Survey Launch** section beginning on page **101**)

2. Once you have received your live survey URL via email, append it with "?resetposition=true".

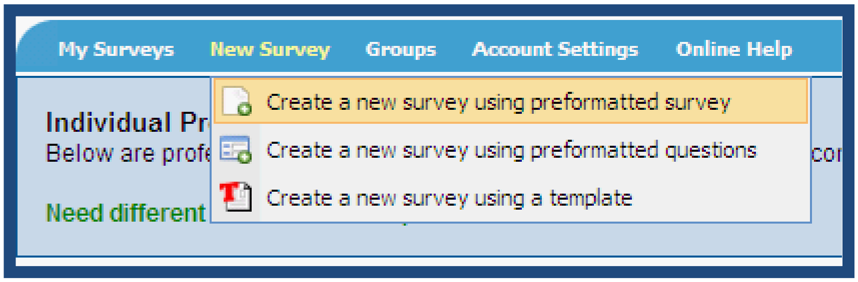
For example, if the original survey URL is…
http://www.insightexpress.com/s/TEST111111

… then the URL allowing respondents to take this survey more than once would be:
http://www.insightexpress.com/s/TEST111111?resetposition=true

Click here to view a brief video illustrating this process.

2. SURVEY CREATION METHODS

To create a new survey, simply log into your account and click on the "New Survey" tab at the top of the page. For additional assistance, we have included numerous helpful hints to assist you in creating surveys.



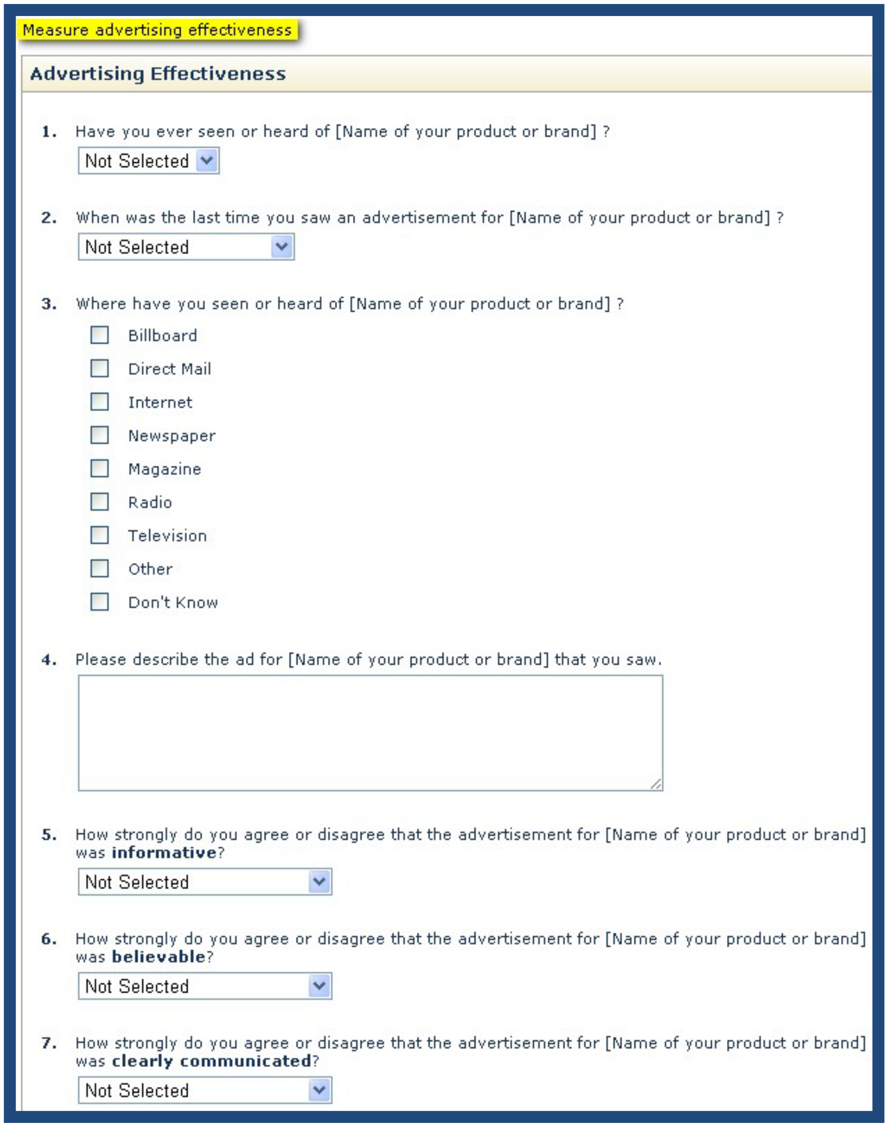
a. Preformatted Surveys (Most Commonly Used)

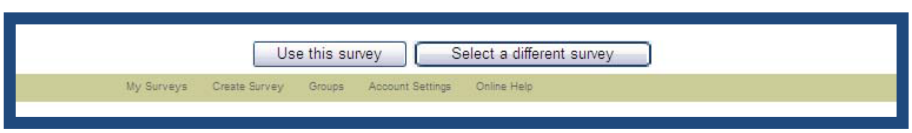
There are multiple options that can be used to create your survey. Preformatted Surveys leverage our marketing research experience by offering preformatted survey templates. These templates can be previewed, selected, and then modified to meet your specific business objective. We offer templates designed to support various research objectives, such as:

- Advertising Effectiveness (Ad Evaluation)
- Attitudes & Perceptions
- Brand Awareness
- Concept Test or New Idea Evaluation
- Customer Satisfaction
- Name Evaluation
- Package Testing
- Pricing Evaluation
- Product Usage Measurement
- Web Site Impact
- Web Site Usability
- Web Site Visitor Profiling

Preformatted Surveys are available to assist you in designing your survey. For each of the surveys genres above, we offer a variety of questions for your consideration.

For example, if you select the "Ad Effectiveness" (Ad Evaluation) template you will see the following questions that you can use and modify to fit your needs:





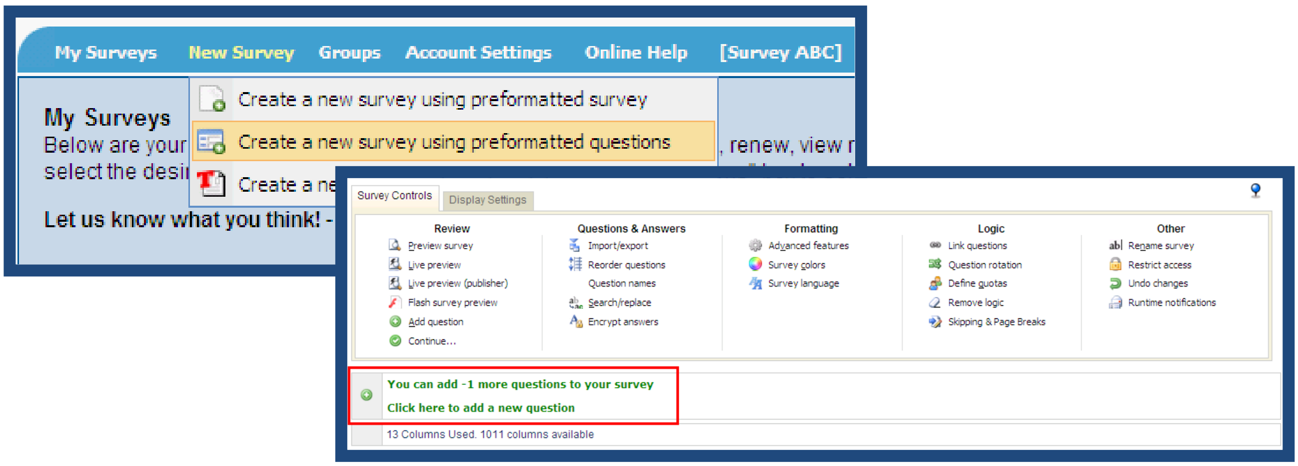
After viewing these questions you have the option to **Use This Survey** or **Select a Different One**.

If you decide to **Use This Survey**, you will be prompted to specify the name of your product and/or brand so that the survey template can be customized for you.

b. Preformatted Questions

Get a jump start on your survey development by using Preformatted Questions. Using our battery of commonly used survey questions and corresponding answer selections is similar to creating a survey from scratch.

To create a survey, click on the **New Survey** tab and then select **Create a New Survey Using Preformatted Questions**.

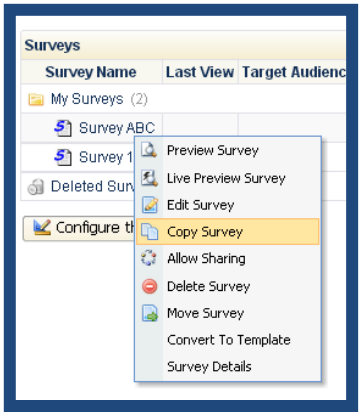


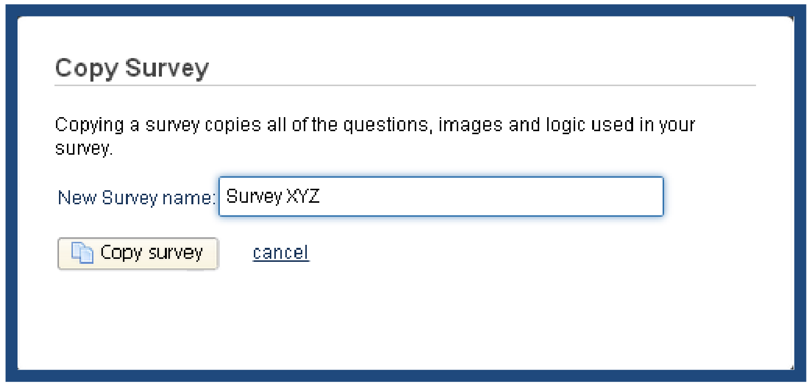
Once you are brought to the **Sequence Questions** page, you will see the **Survey Controls** box and the option to **Click Here to Add a New Question**.

The options within the Surveys Control box are discussed throughout this manual, please reference **Section 4: Survey Creation-Adding Questions to Your Survey** on page **17** for further details & information.

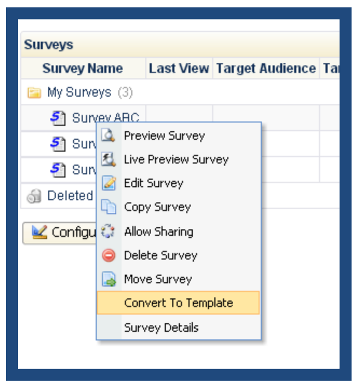
c. Using a Template / Copying an existing survey

With InsightExpress, you can create survey templates that are similar to the surveys used by others in the same workgroup. Alternately, you can also create a survey by using the **Copy Survey** option.



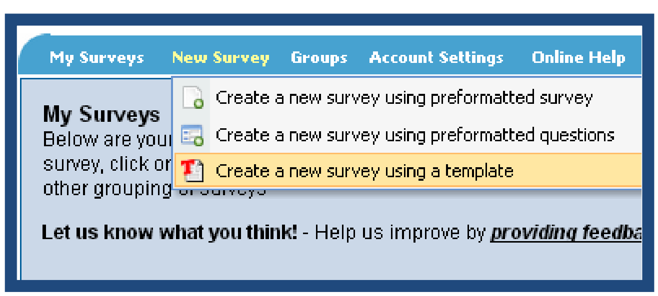


To create a survey template, you must first select an existing survey from with your **My Surveys** page. Then, select **Convert to template.**



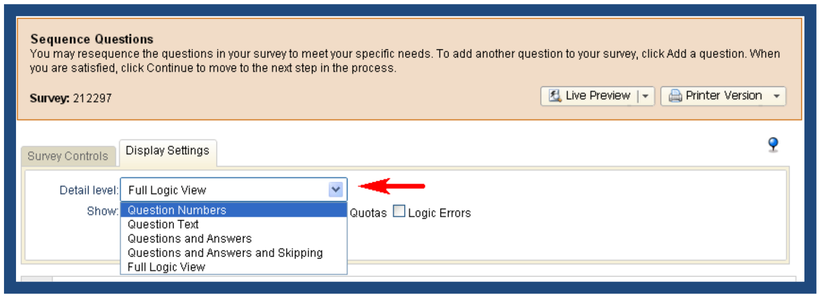
***Please Note:** Survey templates, can NOT be launched as a live survey. However, you may copy your template to as a new survey that you may both edit and launch.*

Once you have created your template, you may create new surveys based off of that template that you may launch to respondents. To do so, select **Create a New Survey Using a Template** from the **New Survey** section within the main account toolbar.



3. SURVEY DISPLAYS

Your survey may be viewed on the Sequence Questions page in different levels of detail (the length of your survey and the number of images may impact the load time.)



Detail level options:

- **Question Numbers:** Only shows question numbers and the first line of the question label. This option will not show any question label formatting.

- **Question Text:** Shows only the question labels and numbers, including formatting and any images within the question label.

- **Questions and Answers**: Shows only the question labels, numbers and answers.

- **Questions and Answers and Skipping**: Shows just the question labels, answer options, and any skipping (including selectively present and scripts).

- **Full Logic View:** Shows everything in the survey including question labels, answer choices, skipping, and response/question options (such as min/max values, specify boxes, rotation, mutually exclusive responses, page breaks and question types.)

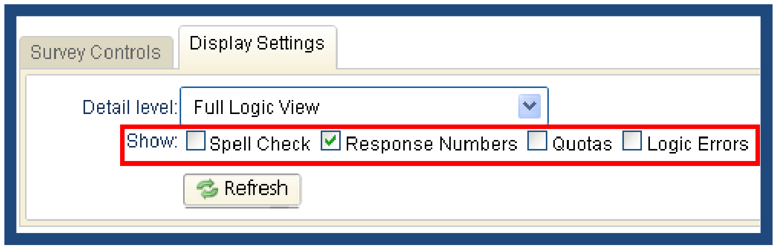
You also have the option to hide or show the following:

- **Spell check:** Shows survey spelling errors.

- **Response Numbers:** Will display the data code of each question response row. These codes are used when referencing certain response rows for advanced logic or scripting. Also, these codes reflect how each response will be coded within certain results exports.

- **Quotas:** Will display all quotas and quota logic at the top of your survey editing page.

- **Logic Errors:** Will show all logic errors within advanced survey scripts.

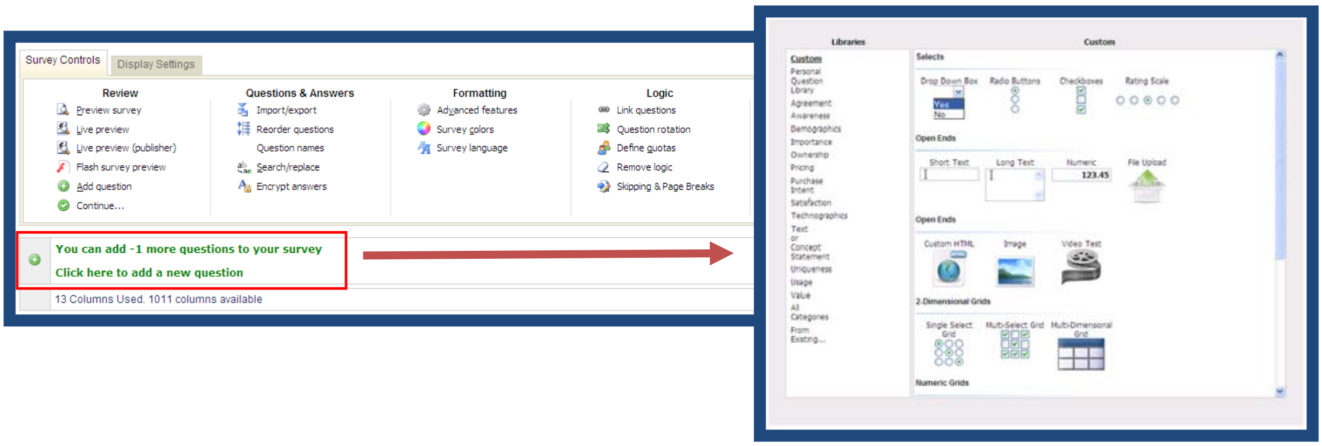


If, at any time, you would like to refresh the page of the Sequence Questions, please click **Refresh**.

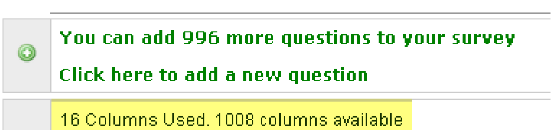
4. SURVEY CONTROLS

a. Adding Questions to Your Survey

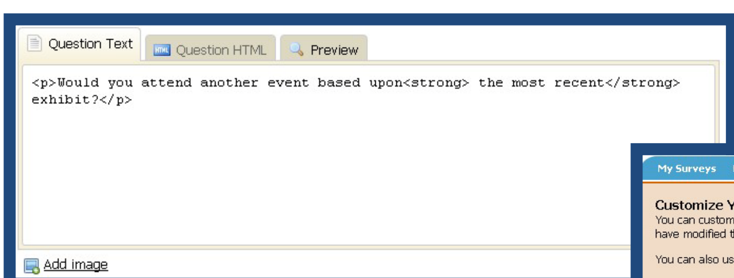
Anytime you add a new question to your survey, you will start at the **Custom** pop up window. This window lists all of your available questions types, as well as the **Libraries** that are accessible to you.



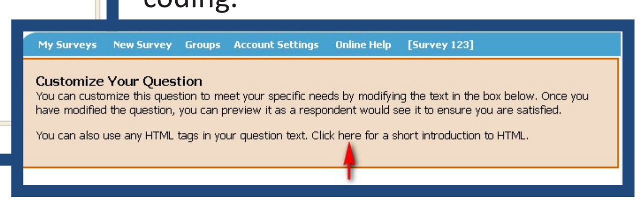
**Please note, below the option to add new questions to your survey, the program will tell you the number of columns that have been used and how many more columns are available. As with most databases, there is a column limitation of 1,024. The number of columns used in our database will depend upon the question type that you choose when building your survey. Should you exceed the 1,024 column limitation, you will be notified.*



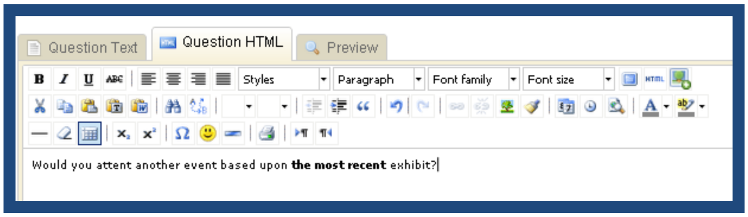
Once a question type is selected, the question editing page will appear. This view will allow you the option to edit the question text, answer set, and set questions options. The **Question Text** box is where questions should be typed, or copy and pasted in. For all questions that you add to your survey, you will see a question text area with three tabs.



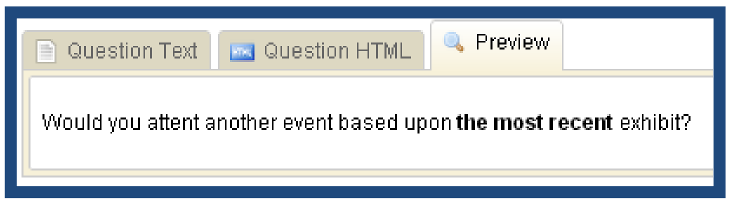
The **Question Text** tab will allow you to put in the question text with HTML coding.



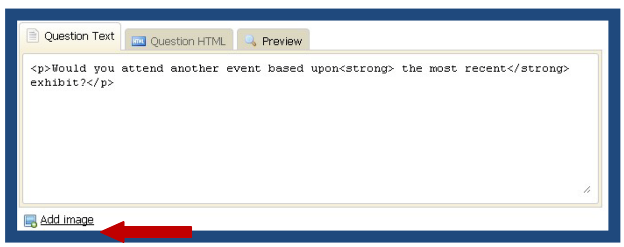
If you are unfamiliar with HTML coding, you can click on the **Question HTML** tab. Here you will see a toolbar similar to that in Word which will assist you in formatting your question text.

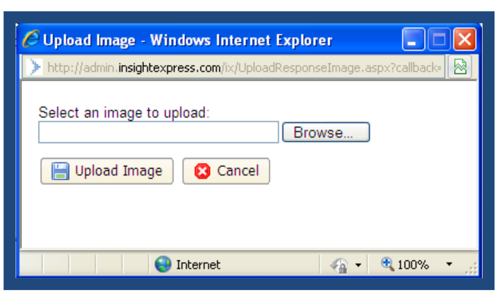


Regardless of whether the question text was inserted by using the **Question Text** tab or the **Question HTML** tab, once you save your question the **Preview** tab will show you how your question text will appear to respondents.



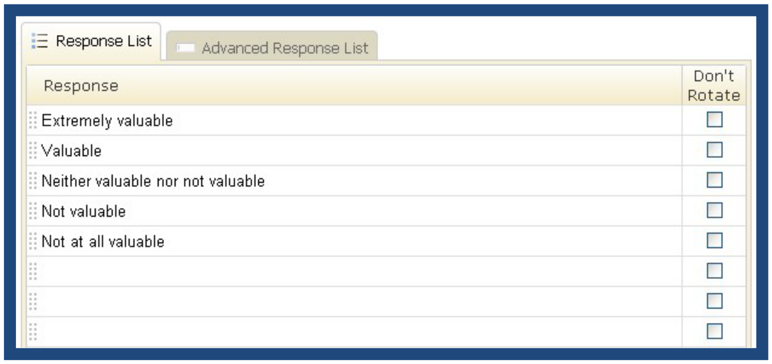
Under the question text area, you have the option to add an image to the question text. To add an image, simply click on the **Add image** link and a new window will appear.



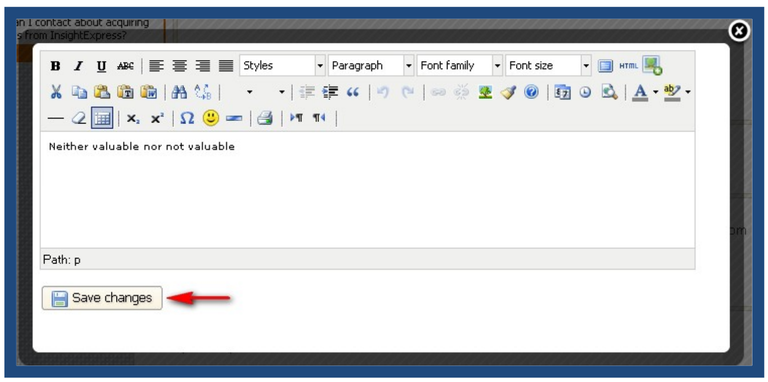


This window will allow you to browse for an image on your computer that can be selected for survey upload. Once uploaded, you will see HTML coding with a link to the image.

Below the Question Text box is the **Response List** box. Here you are free to edit the list of possible responses in your response list.



In cases of editing long response sentences, question types with customizable response options now have a feature which allows you to double click on the individual response row and edit the response text in a new window. This view will also display the editing options listed in the **Question HTML** tab.

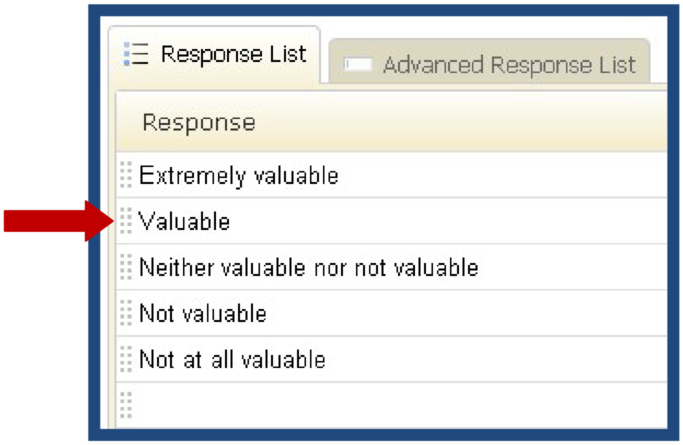


***Please note**: This feature does not apply to question types that do not have customizable response options. Drop Down question types are also excluded.*

You may also enter possible responses in the **Advanced Response List** tab, which will allow you to take a bulk of information and insert it into the response list all at once.

Once you click back on the **Response List** tab, your responses will be returned to individual cells.

***Please note:** custom HTML tags cannot be applied within response rows in a drop down question type.*



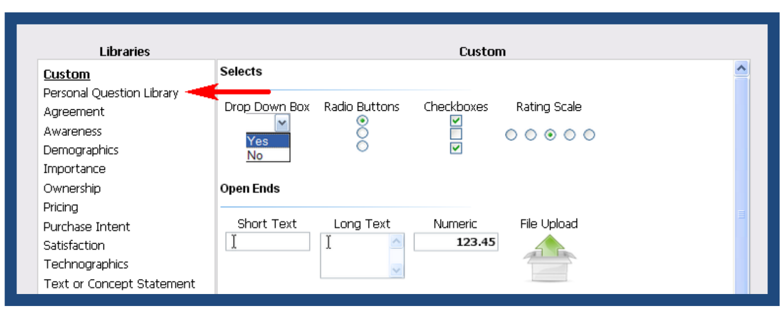
To the left of the responses in your **Response List** you have an image of eight very small dots that will allow you to "drag" the response to a different order.

Simply hover over the dots, click and move the response to the order that you wish.

You will also notice to the right of the **Response List** is the option of indicating whether or not you would like to keep your responses anchored from rotation (rotating responses is further explained on page **23**).

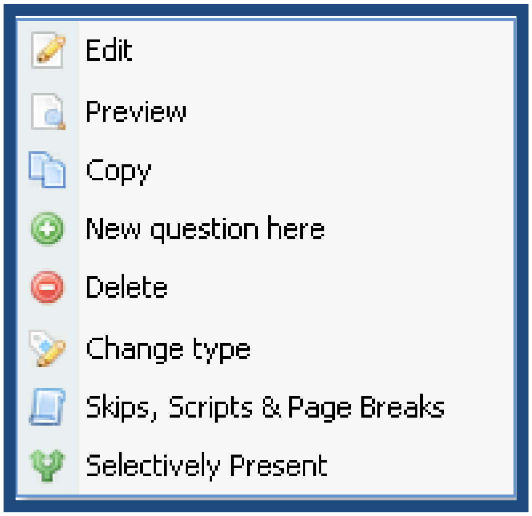
Previewing the question is suggested once you have established question text and response list options. To preview your question, the **Show question preview** link is located at the bottom of the page. This preview will display the question in the same page just below the **Question Options** box. However, if you prefer to view the preview in a new window you have the option of selecting the **Save and preview** button at the bottom of the page.

Another feature is the option to save the question to your account. Clicking on the **Add to library** button will add the question you have just created to your **Personal Question Library**. Your Personal Question library can be found in the **Available Questions** box when you add a new question. Add to library is further discussed on page **55**.



b. Question Menu Options

After you add questions to your survey, the following options are available to help make further edits and modifications. You may access this menu by left-clicking any question in your survey.



Edit: Allows you to edit your question.

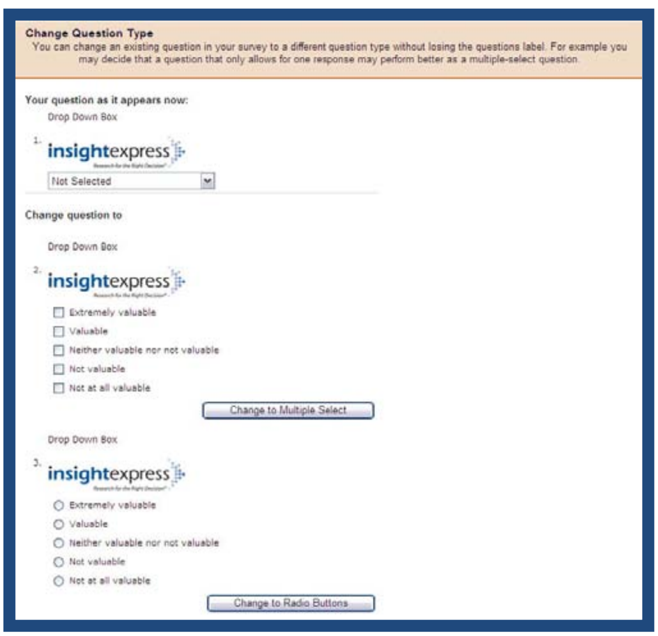
Preview: Allows you to preview your question to see what it will look like on a live survey.

Copy: Allows you to copy your question if you decide to use the same question format with slight modifications.

New question here: Allows you to insert a question prior to the question you have clicked/selected, instead of adding it at the bottom of the survey.

Delete: Allows you to delete a question.

Change Type: Allows you to change the question into a different question type. The listed question types include: checkbox, drop down, radio, short text, or long text.

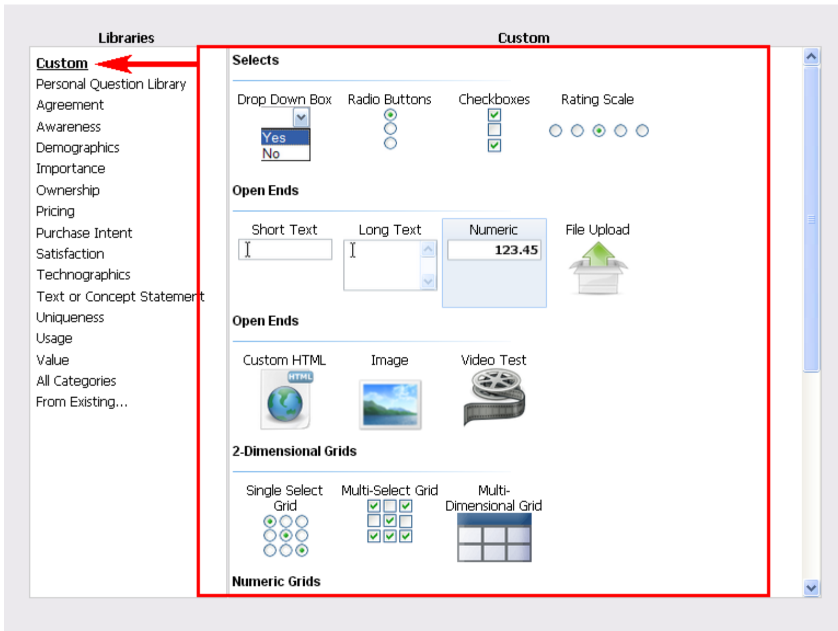


Skips and Scripts: Allows you to add skipping logic based on how a respondent answers a question. For more information, please refer to page **75**.

Selectively Present: Allows you to selectively hide or show a question based on how a respondent answers a previous question. For more information, please refer to page **77**.

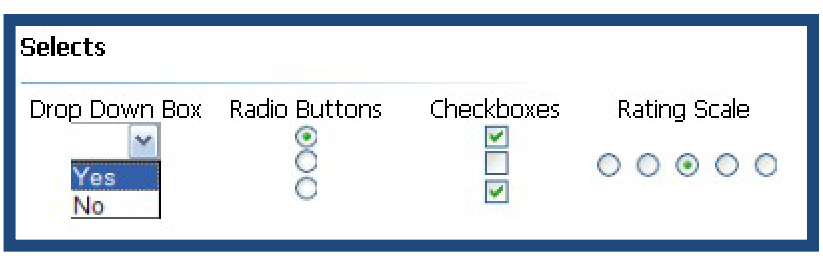
5. SURVEY QUESTION TYPES (CUSTOM LIBRARY)

Upon creating your survey using the "**Create a New Survey Using Preformatted Questions**" button, you will be presented with the Custom Questions Library – home to InsightExpress' major question types.



Please Note: *If you are fielding your survey to an internal audience and would like to capture personally identifiable information (PII) such as a respondent names, email addresses, etc you may do so using hidden query strings. To ensure proper data collection, InsightExpress recommends inserting any query strings at the beginning of your survey. For more information, you may refer to* ***49***.

a. Selects



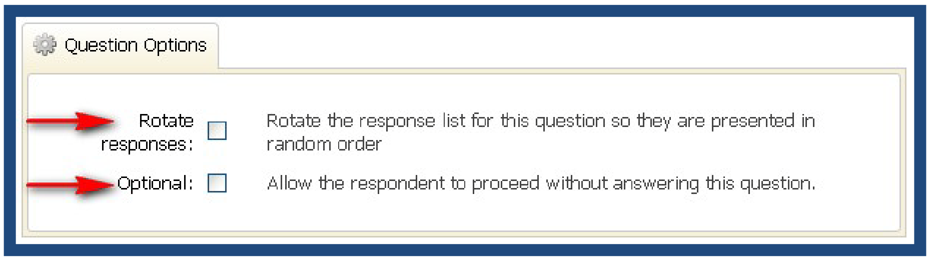
i. Drop Down Box

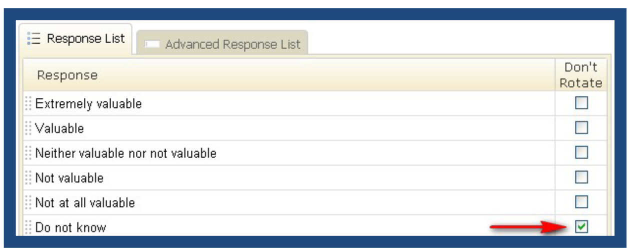
Question Profile:

- **Defaults**: Required, Single Select
- **Available Options**: Rotate Responses, Optional
- **Additional Notes**: *custom HTML tags cannot be applied within response rows*

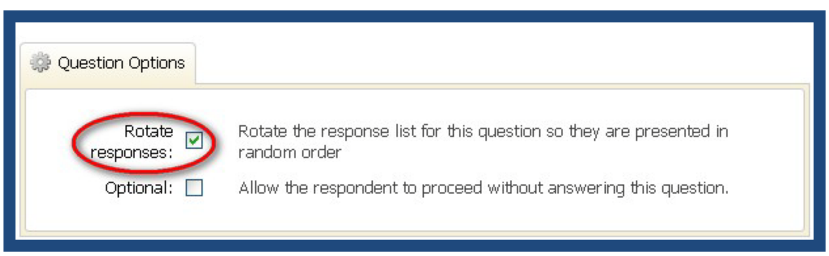
The Drop Down Box is one of two single select question types that we offer. To add a drop down box, simply click on the question type in the **Available Questions** box.

Like most question types, options available for Drop Down question types are: **Rotate responses** and making the question **Optional** to respond.





If you would like to rotate the response list for this question so they appear in random order simply select the **Rotate Responses** checkbox. However, as discussed in the previous section, if you would like to anchor specific responses you can select the **Don't Rotate** option in the Response List for the specific response choice. Please see the following screenshot:



An example of answer choices you may not want to rotate are: **Other**, **Do not know, and None of the above.** These answer choices would then serve as an anchor to your list. By leaving the **Don't Rotate** boxes unchecked, you eliminate potential survey bias because your survey will rotate though the entire response list.

You may also drag the responses to a different order by hovering over the columns to the right of the responses as well. (Earlier we mentioned that you can move them by hovering over the

eight small dots to the left of the responses.)

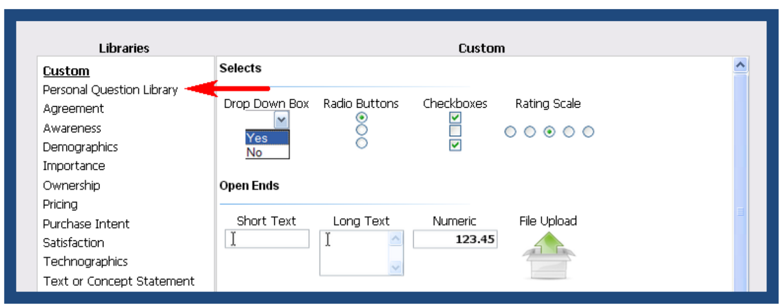
When you are finished creating your Drop Down question, you can choose to **Save Changes**, **Save and Preview**, **Pre-populate Answers**, **Add to library** or **Cancel**.

Save Changes allows you to save the changes made to your question and returns you to the **Sequence Questions** page where you may add additional questions.

Save and preview allows you to preview the question as it will appear to a respondents prior to returning to the **Sequence Questions** page. By clicking on the **Cropping Tool** icon to the left of the question number, you can make modifications to the question before returning to the Sequence Questions page. If no further modifications are necessary, simply click on the **Done with preview** button at the top of the screen.

Pre-populate answers is detailed on page Error! Bookmark not defined..

Add to library will add the question you have just created to your **Personal Question Library**. Your Personal Question library can be found in the Available Questions box when you add a new question.



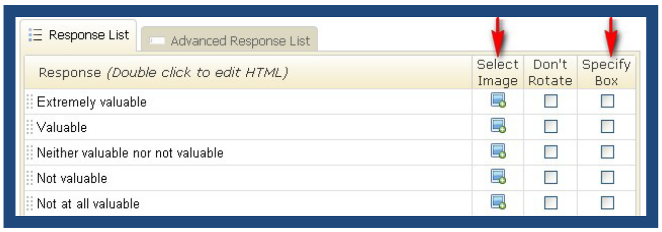
Cancel allows you to reject the changes made; modifications will not be saved. After selecting the **Cancel** option you will return to the Sequence Questions page.

ii. Radio Buttons

Question Profile:

- **Defaults**: Required, Single Select
- **Available Options**: Rotate Responses, Optional, Select Image, Specify Box

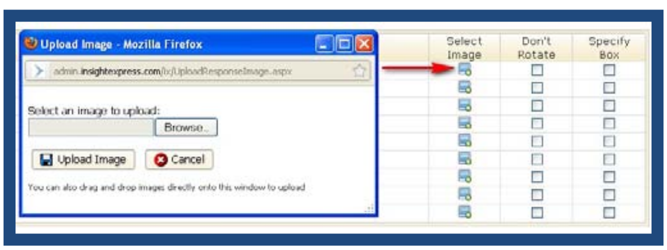
Although response list features are the same as Drop Down options, you will notice two additional columns below– **Select Image** and **Specify Box**.



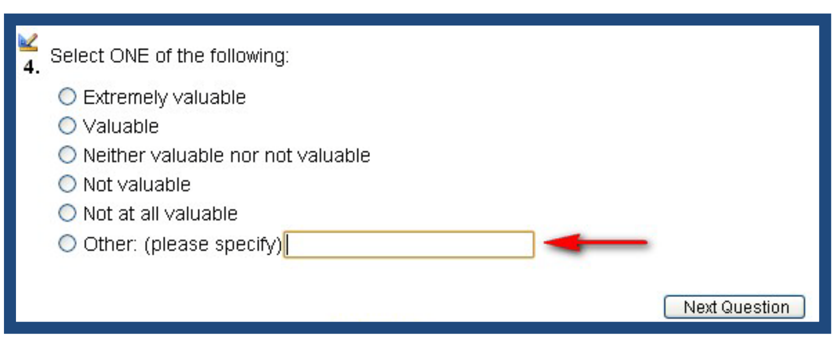
Select Image allows you to upload an image into your answer set. To upload an image, simply click the Select Image icon and a new window will appear. Within the new window, browse for an image and upload to the response list.

You also have the ability to drag and drop images directly onto the window to upload.

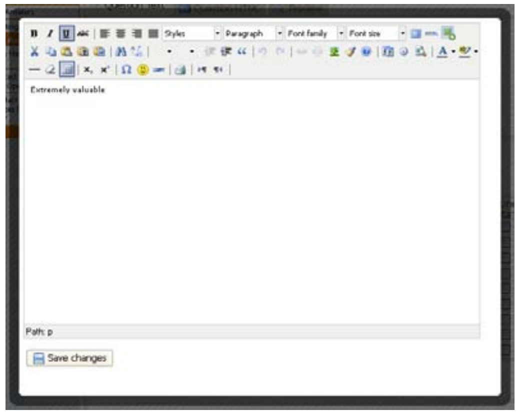
**Please Note: the image that you upload to your question text should be the size that you would like it to appear in the survey.*



Specify Box should be used if you have a response option of **Other: Please Specify**. Selecting this option will insert a text box to the right of a response, providing the respondent with an open-ended response field with a 50 character limit. If a respondent selects this as their response, they will be required to enter text into the specify box before proceeding to the next question. Below is how this question, with specify box, will appear to respondents:



Another feature within the Radio Button question is the ability to customize response rows by double clicking on any individual row. Once you double-click on a row, the below screen will pop up allowing you to customize your response row text.



iii. Checkboxes

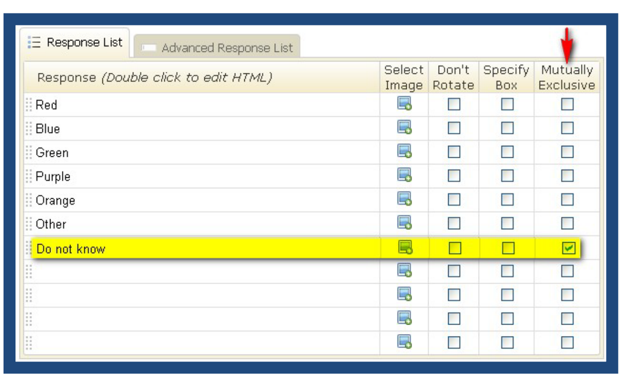
Question Profile:

- **Defaults**: Required (Min Checks: 1), Multi-Select
- **Available Options**: Min Checks, Max Checks, Rotate Responses, Optional, Select Image

Checkboxes are a multi-select question type that allows the respondent to choose more than one answer.

When using a multiple response question type, you have additional options to help customize your question. Similar to the single select question, you have the option to *add an image, not rotate answer choices, add a specify box, and customize response row text*.

Additionally, with multiple response questions, you have the option to make an answer choice **Mutually Exclusive.** When Mutually Exclusive is selected, it validates that no other responses can be selected. This option is often used when **None of the above** and/or **Don't Know** answer choices are offered to respondents. To engage this feature, check the Mutually Exclusive box in the same response row.

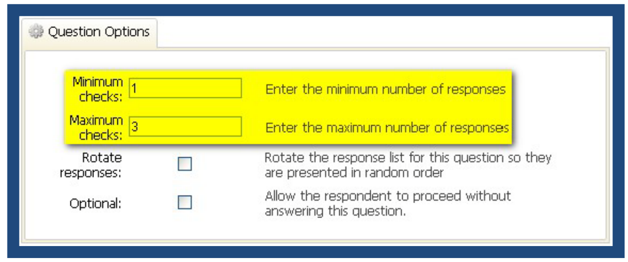


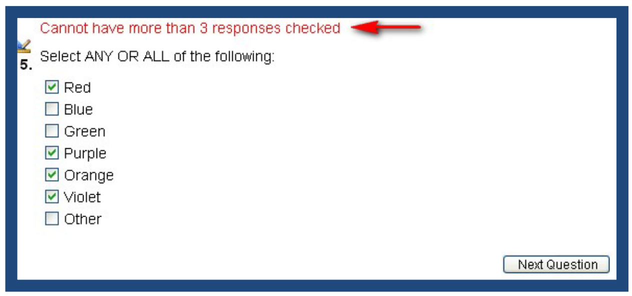
In addition to making the question optional and rotating the response rows, minimum and maximum response options are available for Checkbox questions. Setting minimum and/or maximum number of responses will limit the

number of responses that can be checked.

Entering a minimum number of responses is defaulted at 1. However, this can be removed to make the question optional or increased if desired (for example, if you were asking a respondent to select their top three choices, you could apply a maximum of 3).

If a maximum number of responses is indicated in the **Question Options**, respondents will not be able to continue to the next question without receiving an error indicating they cannot have more than 'X' responses checked. Please see the image below:



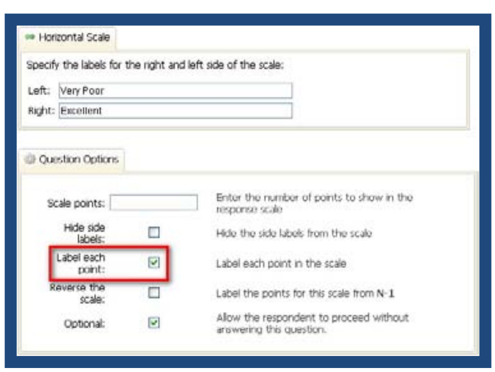


iv. Rating Scale

Question Profile:

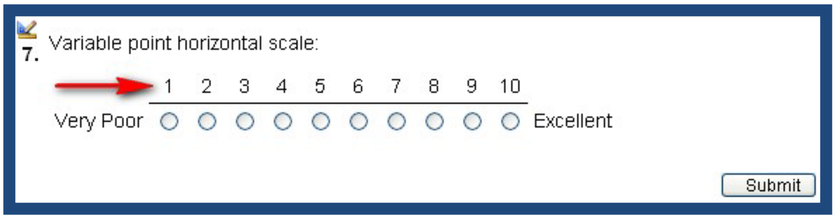
- **Defaults**: Optional, 10-point scale with points not labeled
- **Available Options**: Scale Points, Hide Side Labels, Label Each Point (1-N), Reverse Scale (N-1), Optional(Require)

Horizontal rating scale questions ask respondents to make evaluations in a scalar format.

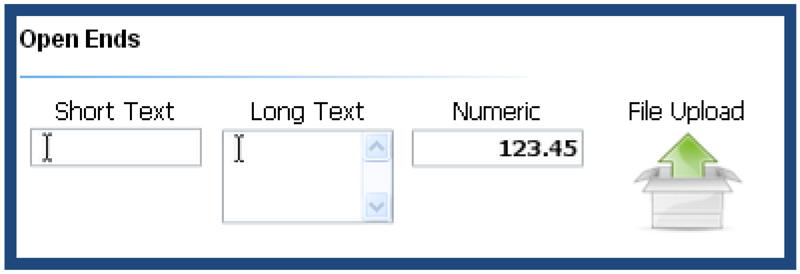


***Please note**, by default "label each point" is unchecked. However, when selected notice the rating scale begins with a '1' rating. Also, if the number of points on the scale is not specified, it will default to a 10 point scale.*

The question appears as:



b. Open Ends (Questions)

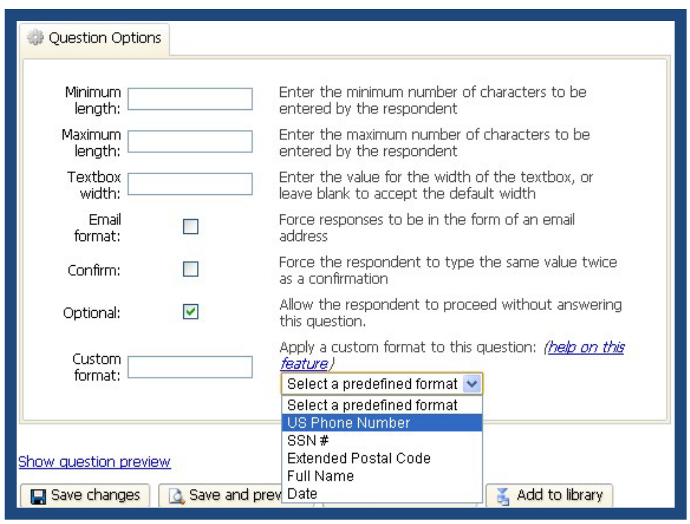


i. Short Text

Question Profile:

- **Defaults**: Optional, 255 char. limit
- **Available Options**: Min/Max Length, Textbox Width, Force Email Format, Confirm Text, Optional(Required), Custom Formats

The question options for the Short Text Box are:



__Please note:__ by default, our open ended text box questions are optional.

If you would like to apply a custom format to your question, the following options are available:

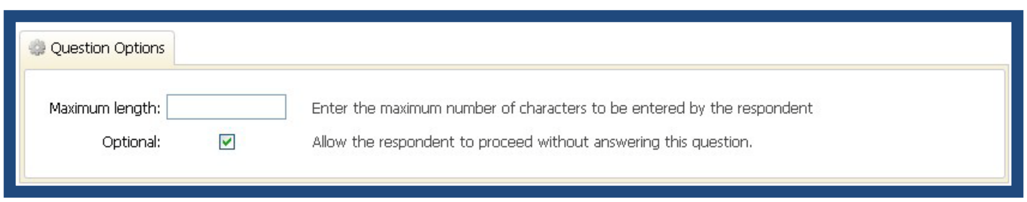
ii. Long Text

Question Profile:

- **Defaults**: Optional, 30,000 char. limit
- **Available Options**: Max Length, Optional(Required)

This question allows for up-to 30,000 characters to be recorded by a respondent. It is an open end question type and is used to gain more knowledge about a respondent's answer choice, personal feelings about a product, or when further explanation is necessary. Unlike a Short Text open end, the respondent can write as much or as little as they see fit.

The question options for the Long Text Box are:



Long Text questions will allow you the ability to specify the maximum number of characters that a respondent is able to enter (it will automatically default to 30,000 if the length is not specified in **Question Options**).

Like Short Text questions, Long Text questions also default to optional. To make the question required, simply uncheck the **Optional** box in the **Question Options** section.

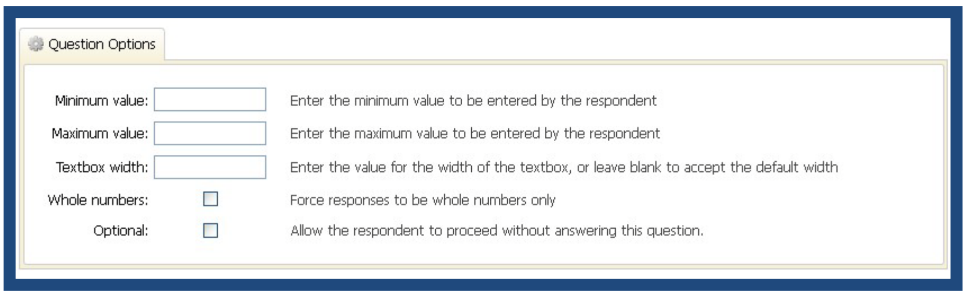
iii. Numeric Open End

Question Profile:

- **Defaults**: Required
- **Available Options**: Min/Max Value, Textbox Width, Force Whole Numbers, Optional

This question type is an open end/free response question type that only allows respondents to enter numbers. It can be utilized to enter an ID number, salary, the price of a particular item, ect.

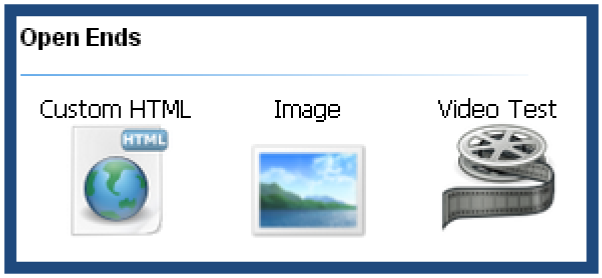
The question options for Numeric questions are:



Numeric question options have the additional option to force responses to be whole numbers. Upon inputting a response that is not a whole number, an error message will be displayed notifying the respondent that whole numbers must be entered before they are able to continue to the next page. Also, like Short Text questions, Long Text questions allow the ability to change minimum values, maximum values, and adjust the table width.

*__*Please note__ Numeric questions are required by default.*

c. Open Ends (Other)



i. Custom HTML

Question Profile:

- **Defaults**: None
- **Available Options**: None

This question type is used as a placeholder for an introduction or concept statement. It can also be used as a section header.

There are no response rows or open ended boxes associated with Custom HTML question types. Custom HTML questions are also not associated with a question number once it is live (questions will only appear to be numbered while in editing mode & when live previewing).

Simply enter your statement in the question text area and save the question. You can customize the text using the **Question HTML** tab. There are no additional question options associated with this question type, but like other question types, you are able to add an image into the question text using the image upload feature.

After clicking on **Save and Preview**, your Custom HTML text will appear in this regard:

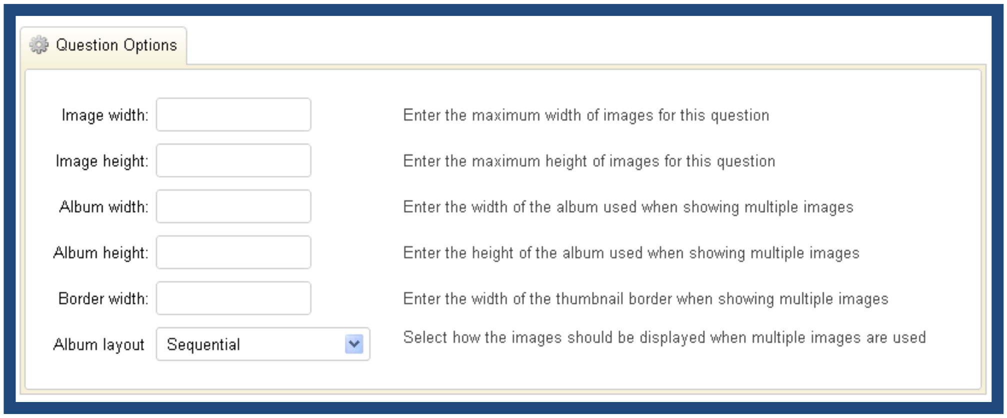
ii. Image

Question Profile:

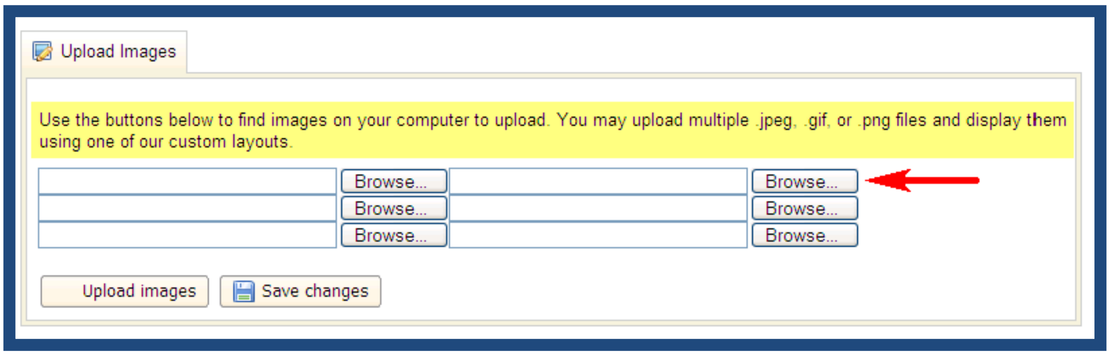
- **Defaults**: None
- **Available Options**: Image Width, Image Height, Album Width, Album Height, Border Width, Change Album Layout

The Image question is similar to a Custom HTML, as it may be used as a placeholder, a section header, or an introduction to precede a question. Like a Custom HTML, the Image question type contains no response rows or open ended text boxes. It will also not be a numbered question once the survey goes live.

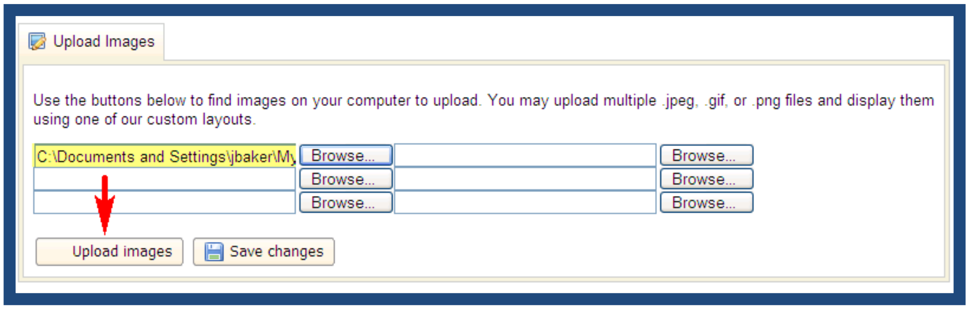
Although you may add images to any question type, the Image question allows you to upload and manage multiple images simultaneously. You may also take advantage of the additional question options noted below.



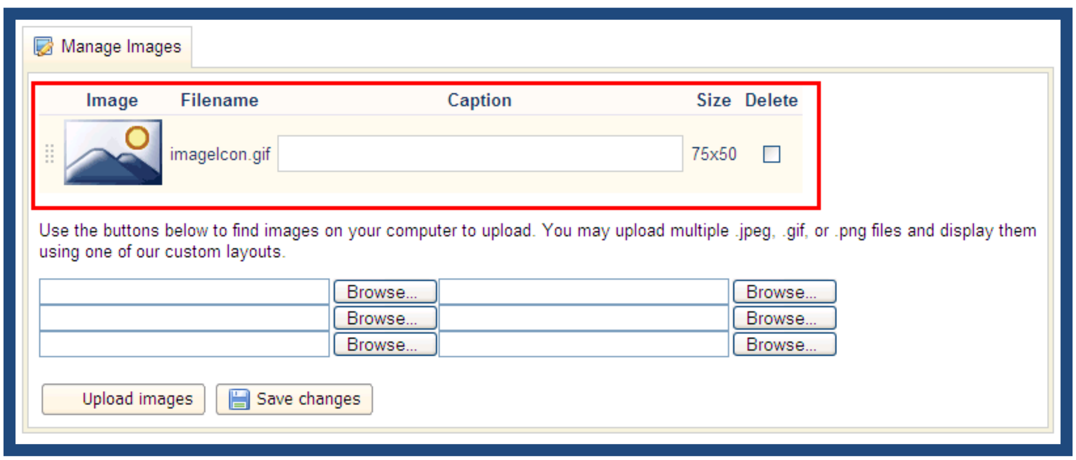
To upload one or more images using this question, select **Browse** within the **Upload Images** section.



Once an image has been selected you may upload it by selecting **Upload Images,** or you may select additional files to upload. As a note, you may only upload up to six images at a time.



After selecting **Upload Images, t**he page will refresh itself and you will then be able to view all uploaded images from within the **Manage Images** section. Here, you are also able to reorder your images (by clicking and dragging the eight dots to the left of each), add image captions, and delete any uploaded images.

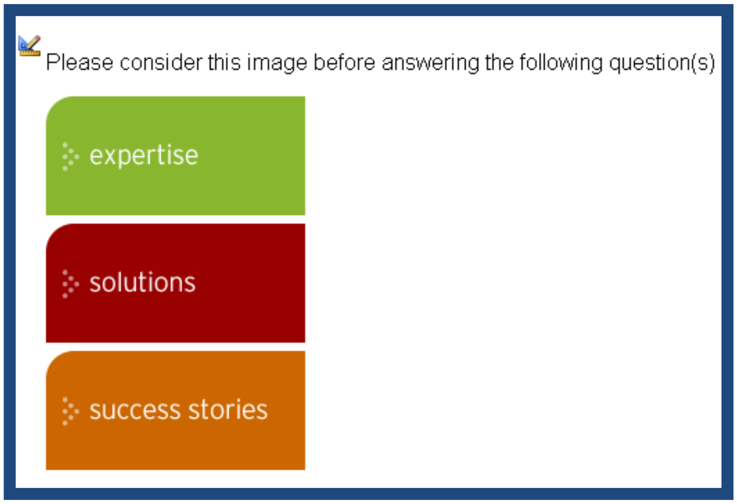


The most significant question option available within the Image question is the ability to customize your album layout**.** The **Album layout** setting, accessible within your question options, allows you to choose from a variety of different layouts that vary depending on the number of images that you are showing. You may display your images within separate rows or columns using the following formats:

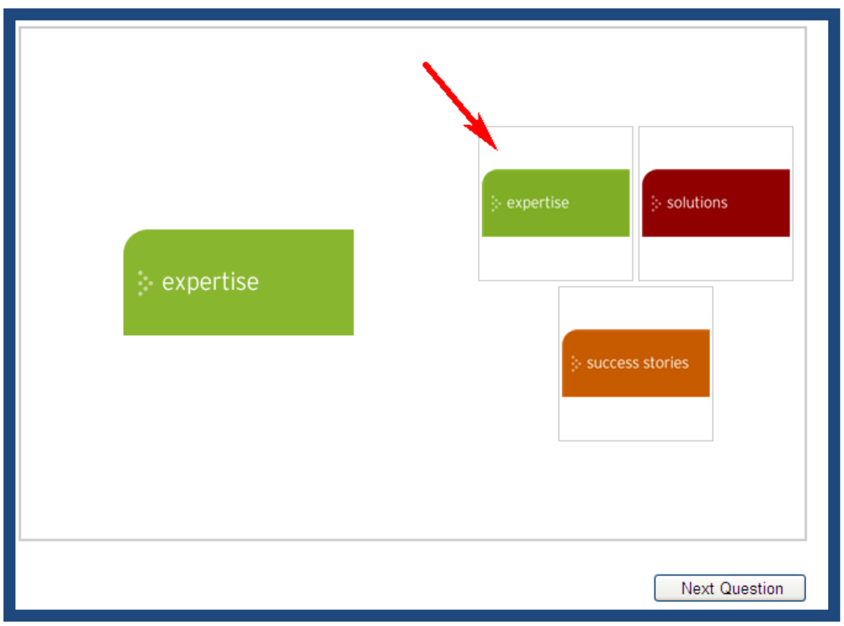
- **1 Column:** Displays images within one vertical column.
- **1 Row:** Displays images within one horizontal row.
- **2 Columns:** Divides images evenly into two vertical columns.
- **3 Columns:** Divides images evenly into three vertical columns.
- **4 Columns:** Divides images evenly into four vertical columns.

In addition to the above layouts, the following **advanced album layouts** are also available:

Sequential: Displays your images one after another. Different from the **1 column** layout, this album layout type allows you to style each image individually through the use of custom scripting. For questions or assistance regarding this scripting, please contact **InsightExpress Customer Support.**

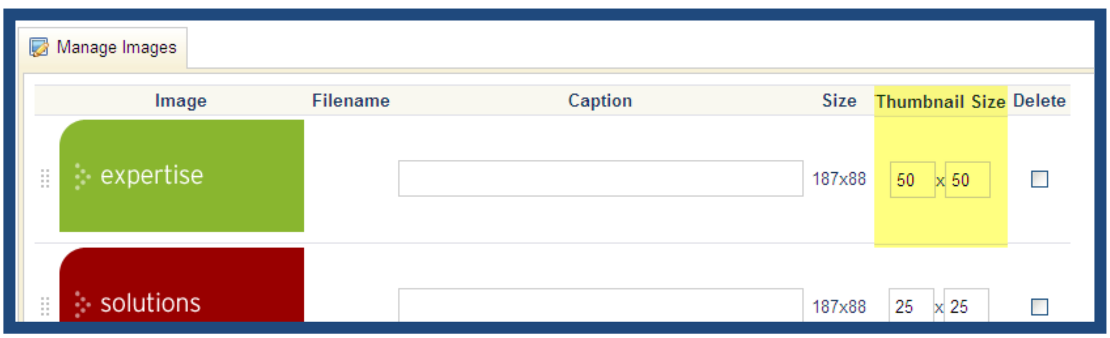


Full Size with Thumbnails: Displays your images as thumbnails. Selecting an image from the thumbnail pane will display the full image on the screen.



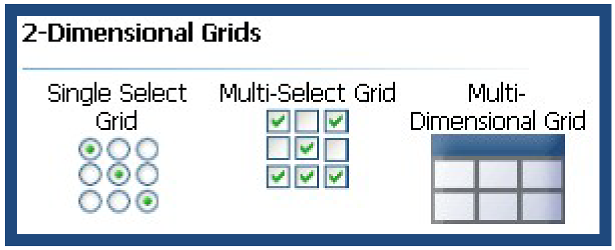
Virtual Book: Displays your images within a two-paned book simulation window. Using their mouse, a respondent may click to zoom in and out of images shown.

Thumbnails with Zoom: This album layout will display a thumbnail of each image in your album. Selecting a thumbnail with then zoom into that image. When selecting this layout, the page will refresh to show an additional column that will allow you to specify the size for each image thumbnail.



The Thumbnails with Zoom layout will appear as follows:

d. 2-Dimensional Grids



i. Single Select Grid

Question Profile:

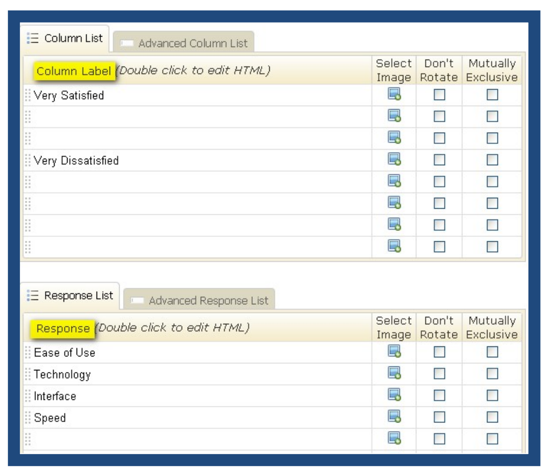
- **Defaults**: Optional
- **Available Options**: Table Width/Height, Row Width, Column Width, Rotate Rows, Rotate Columns, Checkboxes, Force a Response, Display Cell Labels, Hide Row Labels

The Single Select Grid question type allows the respondent to rate multiple items at one time.

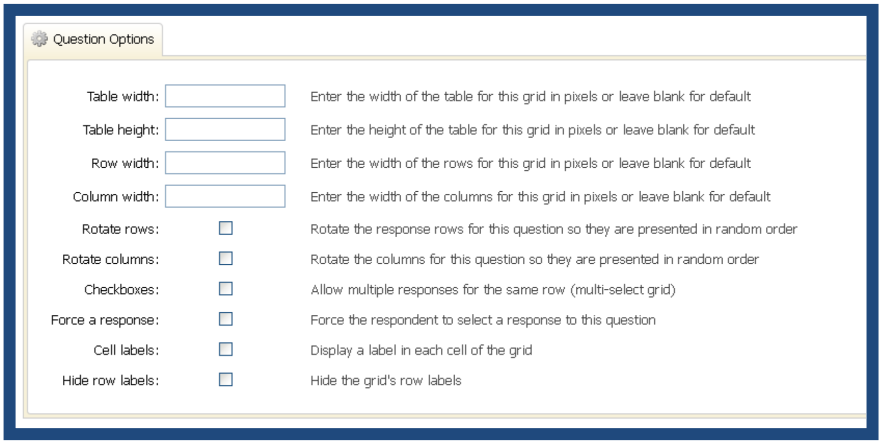
Like a radio button question type, a single select grid allows only one column to be selected per response row, as a default.

After entering the question text, you will have the opportunity to define the **column labels** and the **row labels.**

These grids can accommodate **up to 14 columns** and not all columns need to be labeled. You may use the dragging feature to re-order the column labels, as well as row labels. In addition, you may anchor the column labels, when this option is selected in the Question Options box.



The following question options are available to customize Single Select questions:



The Single Select Grid question appears as follows:

ii. Multi Select Grid

This question type allows respondents to select multiple answer choices in the same row.

Question Profile:

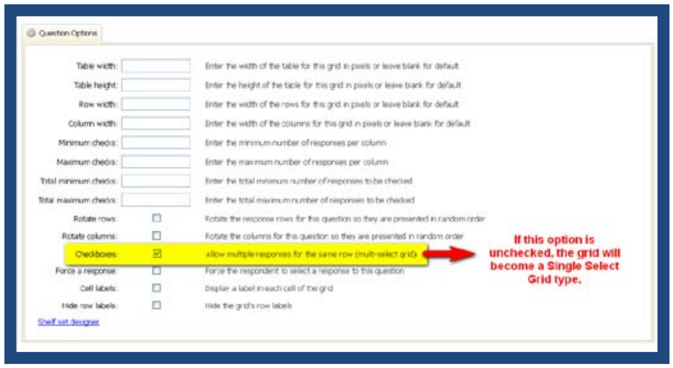
- **Defaults**: Checkboxes, Optional
- **Available Options**: Table Width/Height, Row Width, Column Width, Min/Max Checks, Total Min/Max Checks, Rotate Rows, Rotate Columns, Checkboxes, Force a Response, Display Cell Labels, Hide Row Labels

Multi-Select Grids are the same as Single Select Grids, except for one key difference, the option

to **allow multiple selections in the same row** is checked off by default.

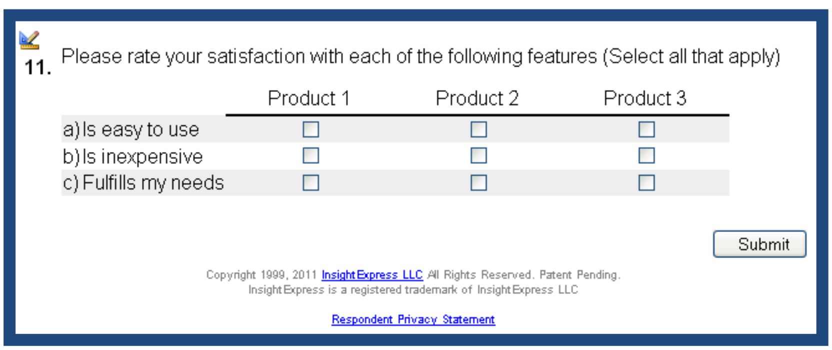
***Please note**: You may also add an opt-out column, such as “None of these” or “Not Applicable”, which can be set to mutually exclusive, by placing the tag **<mutuallyexclusive>** next to a column label.*

Additional features for this question are:



****Please note**: If you choose to specify how wide the entire grid table will be, you will need to make sure that the table width is equal to the pixel width you choose for the column of the response list as well as the entire area for the checkboxes.*

Here is how this question type will appear:



iii. Multi-Dimensional Grid

Question Profile:

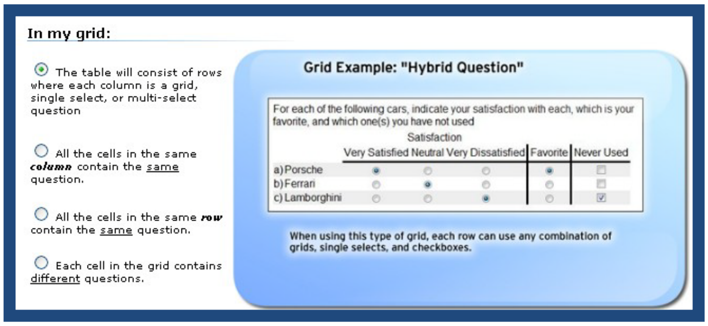
- **Defaults**: Depend upon child question type
- **Available Options** (Parent Question): Hide Side Labels, Show Labels, Show grid Border, Rotate Rows, Rotate Columns
- **Available Options** (Child Question): Depend upon child question type

A Multi-Dimensional (MD) Grid is a complex question type that allows you to ask respondents multiple questions, across a variety of question types for one or more specific attributes, all within a compact format.

Upon selecting the Multi-Dimensional Grid question, you will be presented with four MD question types that depend upon the type of questions you would like respondents to answer. Once you have selected an MD grid type, you will be guided through the question creation process.

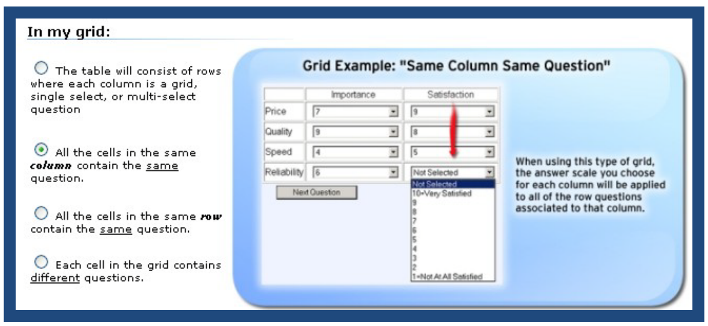
MD Grid Types

Hybrid Questions:



Allows you to ask respondents multiple types of questions for one attribute. In the example pictured above, there are three questions being asked about three different cars. The first question, “satisfaction”, is formatted as a Single Select Grid. The second question, “preference”, is formatted as a Single Select question. The third question, “usage”, is formatted as a Multi-Select question.

Same Column Same Question:

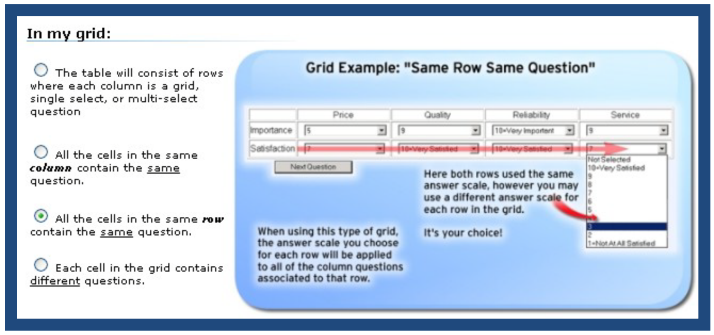


With a Same Column Same Question multi-dimensional grid, a single question is asked in one column for all responses Similar to programming a Hybrid Multi-Dimensional Grid, you need to label the column and row labels within your question in order

to create the Same Column Same Question type. However, because each column is the same question, you select the question type after you label the columns and rows. We offer six different question types and the ability to make the questions in the column optional.

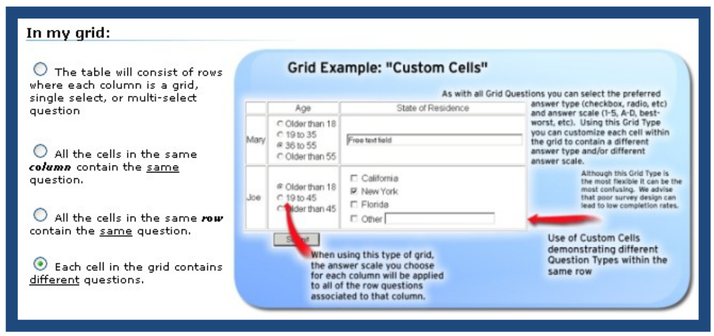
Same Row Same Question:

With a Same Row Same Question multi-dimensional grid the same question can be asked across rows but have different attributes across columns. This question type is the reverse of the Same Column Same Question format.



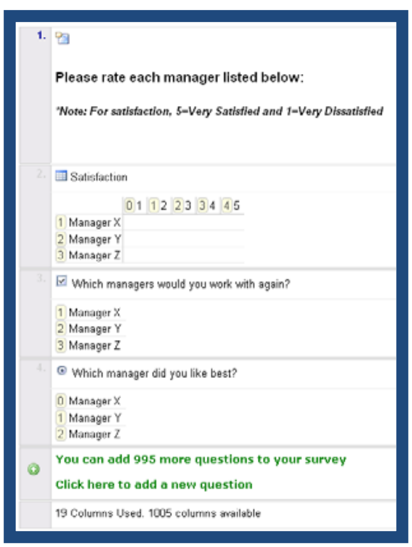
Custom Cells:

With the Custom Cells grid, a different question type is available for each row/column combination.



MD Grid Attributes

Each MD Grid is divided into two sub-questions—<u>One parent question and several children questions</u>



Parent Question: This is the overall question being asked of your respondents and it links together the child question(s). The parent question is programmed as a concept statement and acts as the receptacle for your children questions.

Child Question: The child question(s) are the individual questions that make up each MD grid.

MD Grids allow the user to ask a variety of questions within a limited survey area. While the same questions may be asked in an individual question format, MD grids can be more aesthetically pleasing. In the example below, a hybrid question was created to measure the feedback of three separate managers (Manager X, Y, and Z). For each manager, three questions (each a different question type), are being asked:

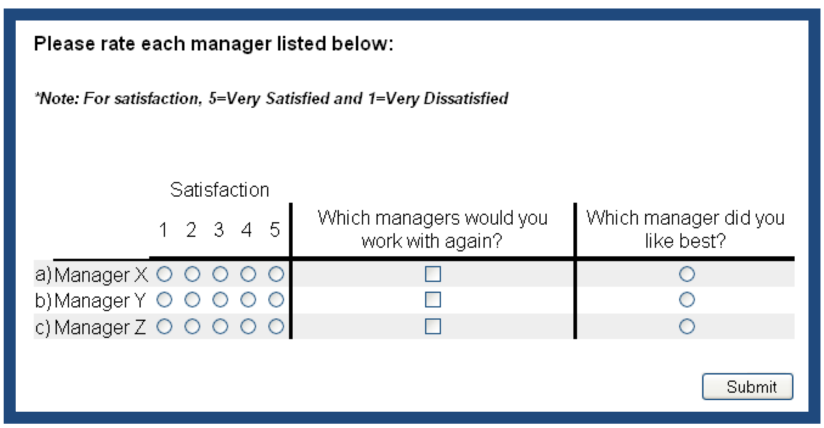
- Satisfaction (Single-Select Grid)
- Which managers would you work with again? (Checkbox)
- Which manager did you like best? (Radio Button)

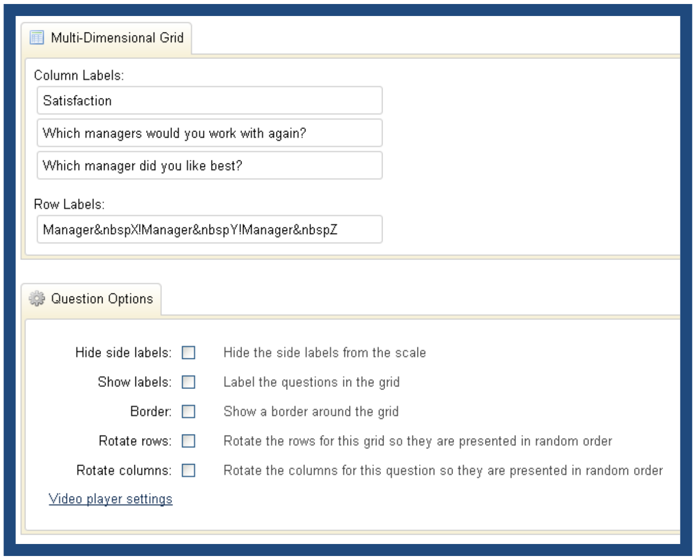
From the Sequence Questions page, you will see the "parent" question (the question that will display the question text) and the "child" questions (the questions that are created for each row and column combination). The "child" questions are labeled according to row and column so that you know which question to edit.

In this example, question 1 is the "parent" question and questions 2-4 are the "child" questions.

After the grid is created, you may edit the text of the parent question and/or each child question, inserting or formatting appropriate question/response text as you would within any non-grid question type.

In this example, the final product will appear as shown below:





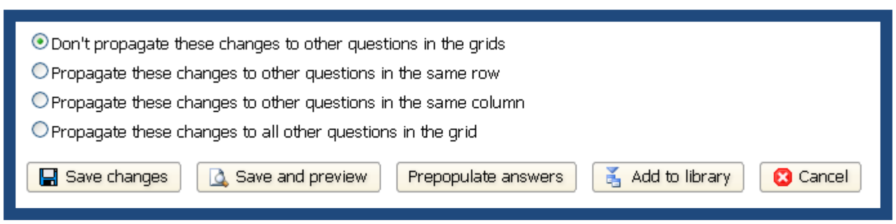
The question options available to all child questions depend upon the type of question being asked and mirror those offered by their non-grid equivalents. However, the question options offered within all parent questions are the same *(please refer to image below)*.

Editing MD Grids

Once created, an MD grid can be very difficult to edit. Due to the complexity of MD grids, you must rebuild this question type if you would like to add/delete response rows/columns. However, while you can make text edits without re-creating the question, you must also edit the text as it appears within the parent question as well as each child question.

Data Propagation

When editing a child question, you also have the ability to propagate all recently made changes to other questions within that grid. The following options are available:



Don’t propagate these changes to other questions in the grids: Will make the changes to this one question and leave all other questions alone. (Set by default)

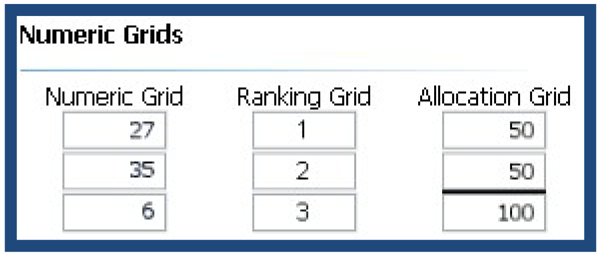
Propagate these changes to other questions in the same row: Saves these changes to the other questions that appear in the same row.

Propagate these changes to other questions in the same column: Saves these changes to the other questions that appear in the same column.

Propagate these changes to all other questions in the grid: Changes all questions within the grid.

****Please Note:** After propagating changes, you must re-label all child questions as propagation also applies to row/column labels.*

e. Numeric Grids

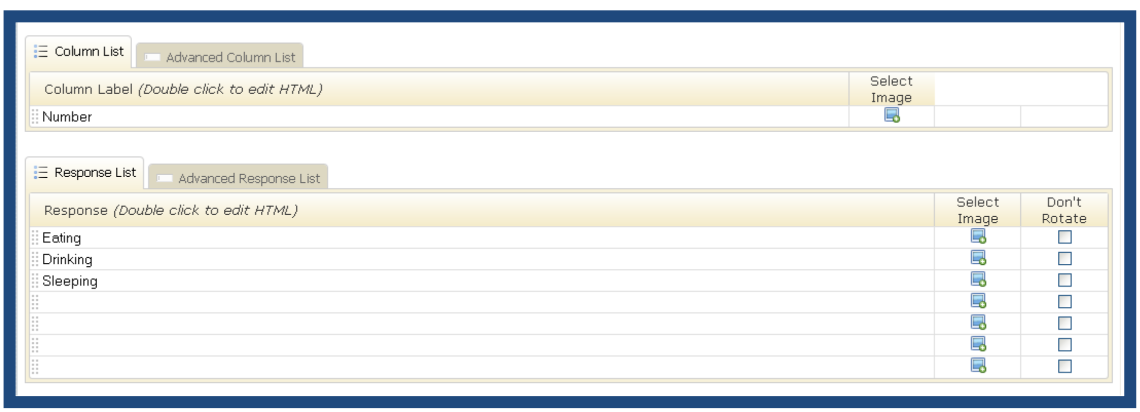


i. Numeric Grid

Question Profile:

- **Defaults**: Required
- **Available Options**: Min/Max Value, Min/Max Sum, Sum, Default Value, Row Width/Height, Label Width, Drag/Drop, Rotate Rows, Show Sum, Force Whole Numbers, Ranking Format, Hide Labels, Optional (Required)

Numeric Grids allow respondents to provide an actual number across multiple attributes.

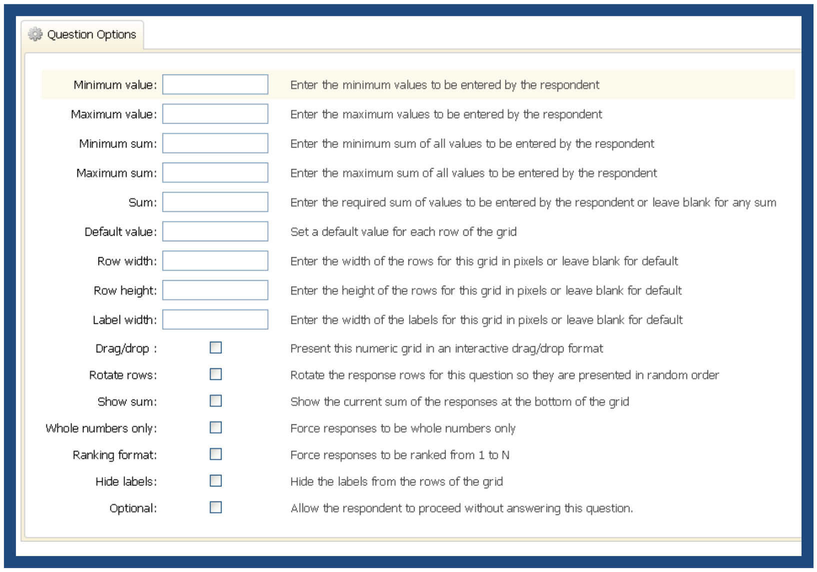


To utilize this question format, you will simply enter in the question text and then specify the column label and response list.

Images or anchors can also be added to response rows. You may also use the dragging feature to reorder the response list. To customize the list further, you may double-click a response row. This will bring up the HTML editing toolbar and will allow you to apply rich text formatting to a

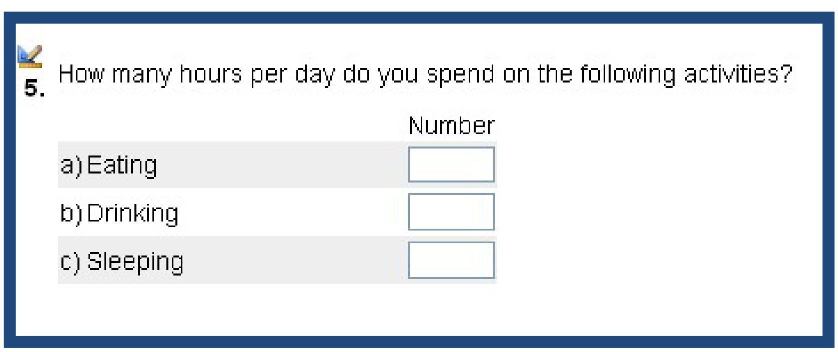
question.

Question options for the Numeric Grid question type include:



***Please Note:** When selecting the "Drag/drop" option, the question will be converted into the drag/drop question type. This option will convert your response columns into draggable labels (For more information on the drag/drop question type, please refer to page **51**).When selecting this option, the number of columns within a question must not exceed the number of responses in your "Response List". Also, if you would like to revert back to a numeric grid, you may uncheck the drag/drop option at any time.*

Here is how a standard numeric grid question will appear to a respondent:

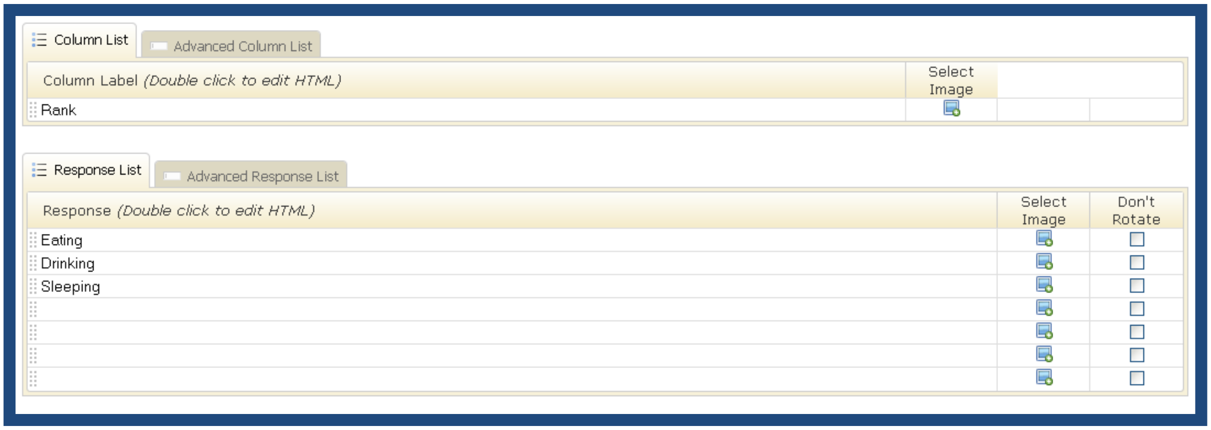


ii. Ranking Grid

Question Profile:

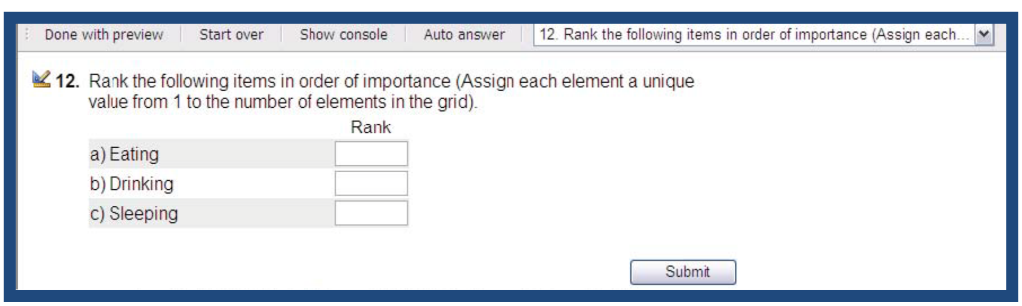
- **Defaults**: Required, Ranking Format
- **Available Options**: Min/Max Value, Min/Max Sum, Sum, Default Value, Row Width/Height, Label Width, Drag/Drop, Rotate Rows, Show Sum, Force Whole Numbers, Ranking Format, Hide Labels, Optional (Required)

Ranking grids allow respondents to rank a list of items from 1-N according to one attribute. In the following example, respondents are asked to rank three different actions (eating, drinking, and sleeping) according to preference. When creating this type of question, please be sure to define the scale being used.



The question options for a ranking grid are identical to those in a number grid (for more information, refer to page **45**. Remember to keep **Ranking Format** checked for this question type, un-checking this option will make this question type into a Numeric Grid.

Here is how the question will appear to a respondent:



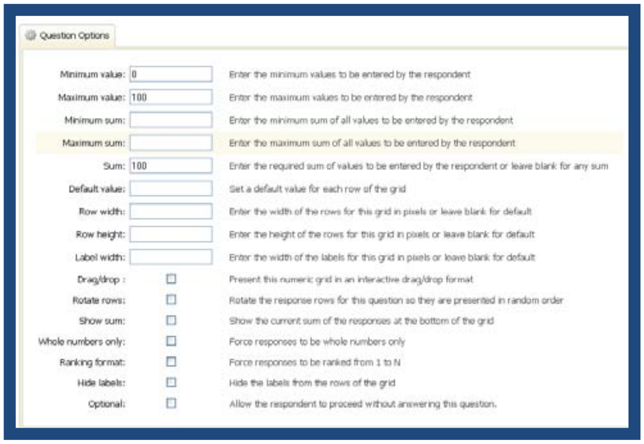
iii. Allocation Grid

Question Profile:

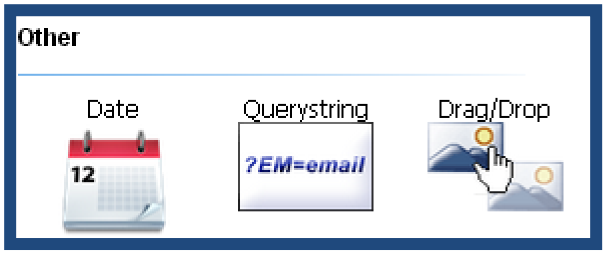
- **Defaults**: Required, Min Value: 0, Max Value: 100, Sum: 100
- **Available Options**: Min/Max Value, Min/Max Sum, Sum, Default Value, Row Width/Height, Label Width, Drag/Drop, Rotate Rows, Show Sum, Force Whole Numbers, Ranking Format, Hide Labels, Optional (Required)

The Allocation Grid question is a numeric grid question in which several question options have default settings.

Question options for the Allocation Grid question type include:



f. Other



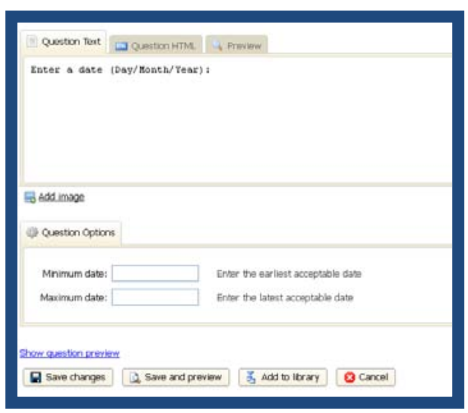
i. Date

Question Profile:

- **Defaults**: None - Placeholder
- **Available Options**: Min/Max Date

The Date question simply allows you to ask a respondent for a date in the format of Day / Month / Year.

To build this question type, simple enter the question text into the field. You can also upload an image into the question text. The question options for the Date question are:



Here is how the question will appear to a respondent:

ii. Query Strings

PLEASE NOTE: *TO ENSURE PROPER DATA COLLECTION, ANY QUERY STRINGS MUST BE INSERTED AS THE FIRST QUESTIONS WITHIN YOUR SURVEY.*

Question Profile:

- **Defaults**: Hidden
- **Available Options**: None

Query strings are hidden questions which can allow you to identify respondents, or groups of respondents, without directly asking them to identify themselves. You may only use this question type when distributing your survey via your email list or Web site.

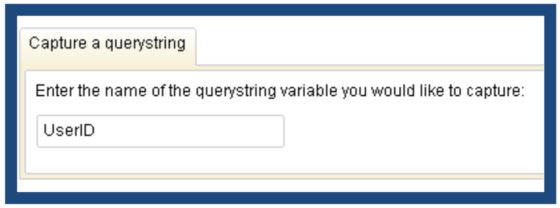
Query strings can capture a unique value, i.e.: ID number, account number, or customer vs. prospect, to identify an individual respondent or any other value to identify a group to which the respondent belongs. You may also use query strings to discover from which Web page respondents came.

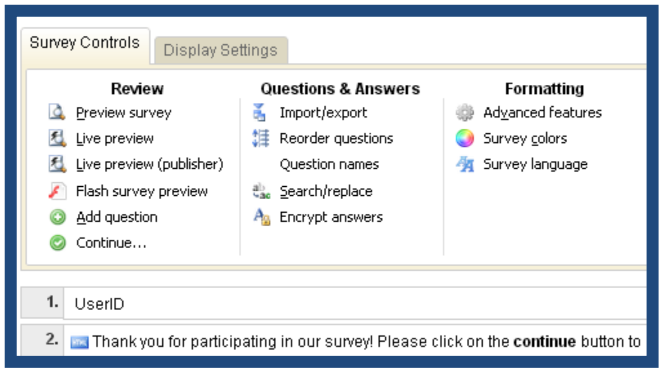
Query string should be used as the FIRST questions within a survey. To add a query string to your survey, click on “New Question Here”**.** Multiple query string questions can be utilized to capture multiple identifiers if needed.

Query string question(s) may also be added to the end of the survey and moved to the beginning. Simply move the question within the **Reorder Questions** section located in the Survey Controls menu (discussed on page **62**). You may also click on the question number and use the blue arrows or asterisk to move the question forward in the survey.

The first step in creating a query string is to give the query string parameter a name (in the example below, it is called UserID). The name you give a query string will be the name you append to your live survey URL (discussed below).

***Please note**: the query string value is case sensitive.*





To capture data using a query string:

When fielding your survey with a query string, you must add the name of the query string parameter and the value to the end of the URL sent to you by InsightExpress.

To append a query string to your survey URL, you must use one of two symbols:

- **?** – Used only when appending the first query string to your URL
- **&** - Used when appending all subsequent query strings to your URL

For example, with the query string parameter as "UserID" the identifier will be passed to the survey by appending the tag: **"?UserID=12345"** to the URL (if UserID is the first query string being appended). The survey will then reach into the URL, pull out the value "12345", and store that value in the query string question for that individual respondent. As larger respondent lists will require you to create more unique URLs, InsightExpress recommends managing your query strings within a 3rd party program such as Microsoft Excel.

Using this query string as an example:

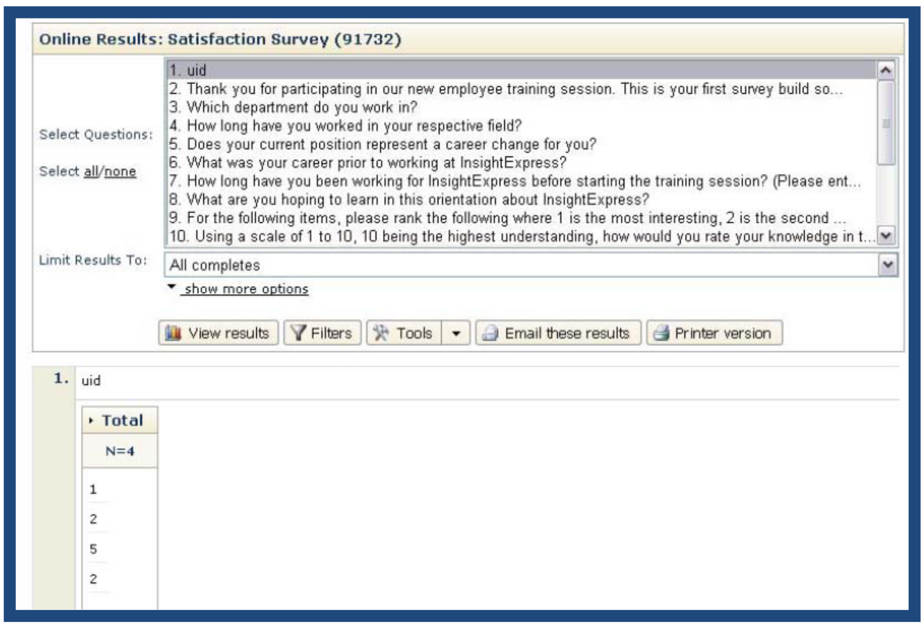
http://www.insightexpress.con/s/abcde
will become → http://www.insightexpress.con/s/abcde**?userid=12345**

***Please note**: If you have multiple query string parameters in your survey use the following format:*

LiveSurveyURL?Parameter1=value1&Pararmeter2=value2

Do not use the following names for your query string parameters, as they are identifiers already reserved by InsightExpress: **id, AccessCode, InlineValidation, resetPosition, startingPosition, invited PanelistID, mID, cmrID, ftouch ,ageTarget, TemplateID ,refer, close, preview, livePreview, setanswer, _siteID, username, password, L, questionnumber, noemail, onfinish.**

When accessing your survey topline results, the query string value is recorded and viewable on a respondent level. This data will be stored as would any other survey question. The data can easily be merged back using the value as a key to the database.



iii. Drag/Drop

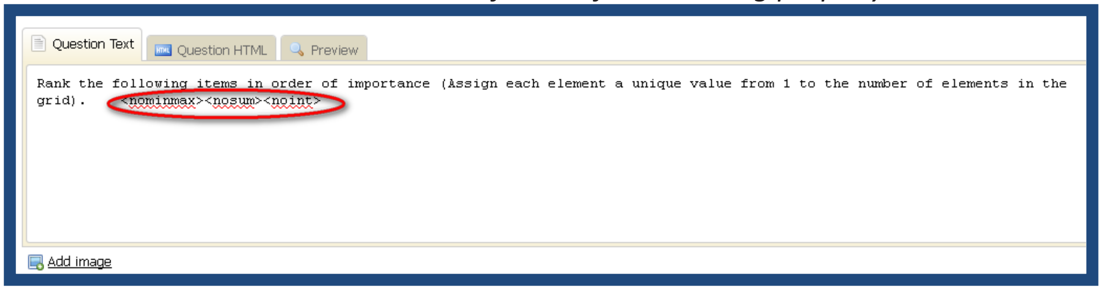
Question Profile:

- **Defaults**: Required, Drag and Drop Format
- **Available Options**: Row Width, Label Height, Rotate Rows, Optional (Required)

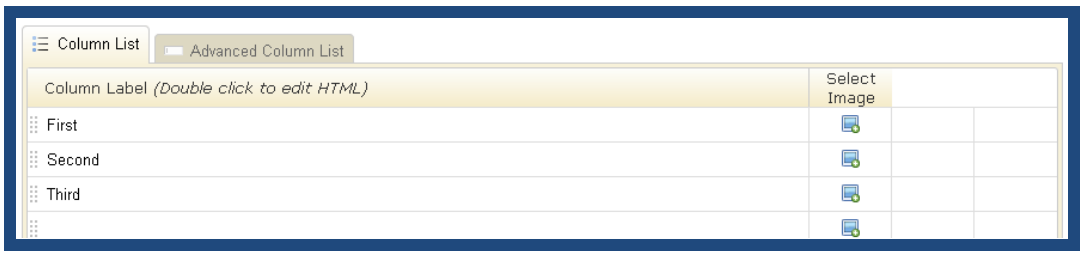
The Drag/Drop question allows respondents to use drag and drop technology to rank a series of items. To “drag and drop,” a respondent clicks on a token and drags it over to a corresponding response to be ranked.

***Please Note:** This question type automatically inserts HTML scripting into the question text, which will allow the question to be in drag/drop format. Removing the scripting that is circled*

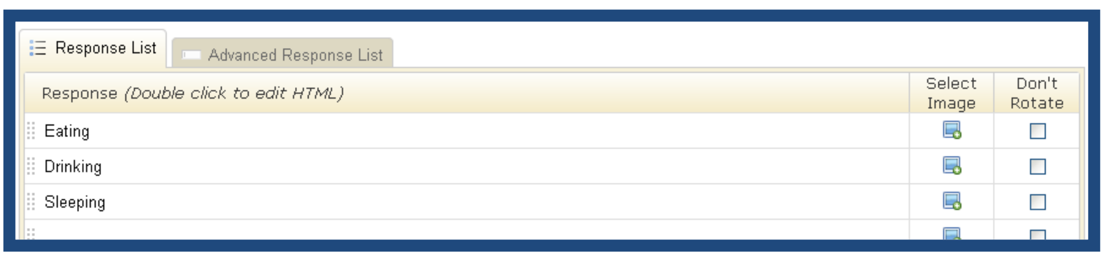
below will inhibit this feature from working properly.



Your column labels are the items that you are "dragging."



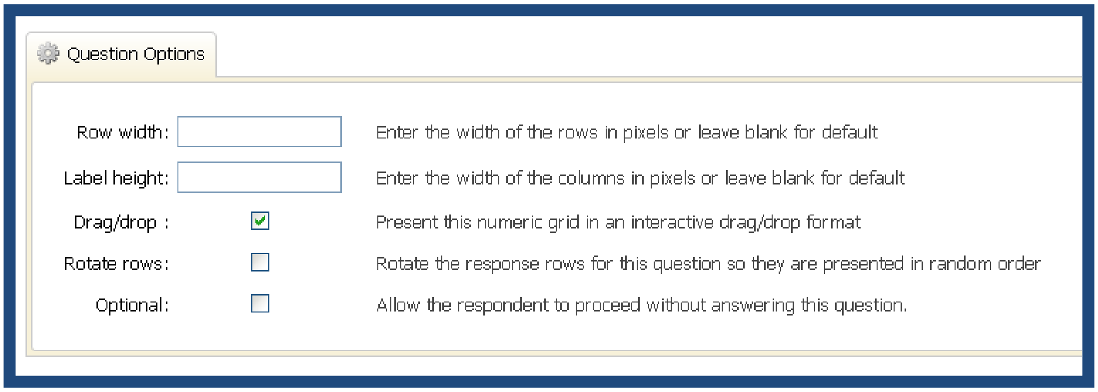
Your responses will become rows where attributes are "dropped."



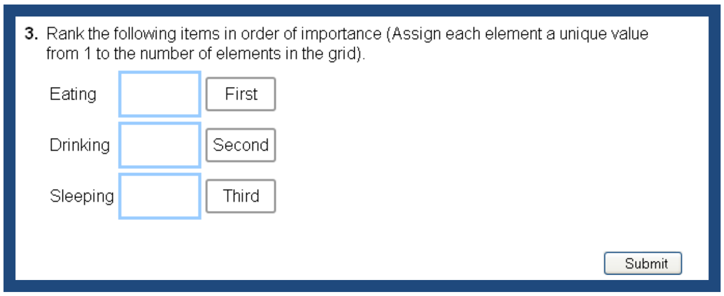
You may also click and drag the dots to the left of each row to reorder column and row labels.

Below are the question options for Drag/Drop questions.

** **Please note:** The Drag/Drop option will be automatically checked off and unchecking this option will cause an error when previewing:*

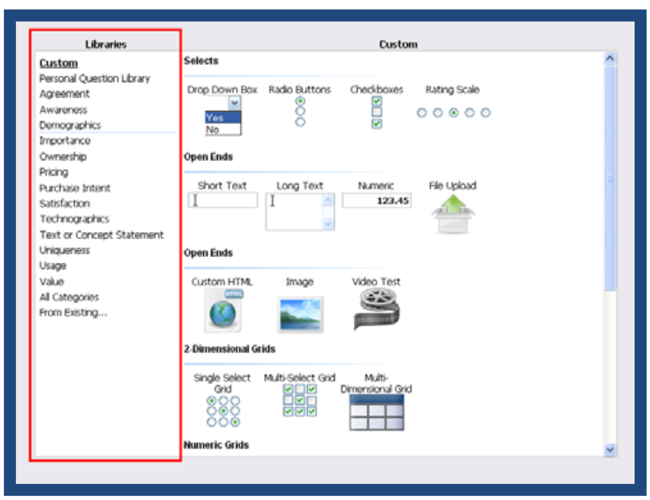


Here is how the question will appear to a respondent:



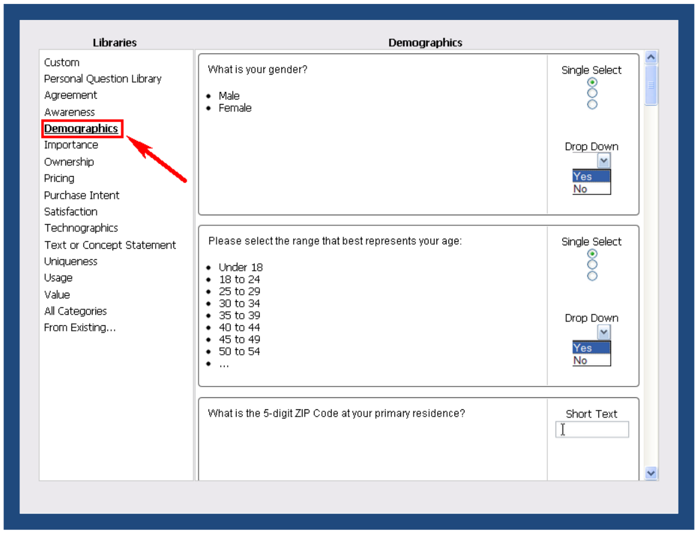
g. Other Question Libraries

There are other question formats available in our library database. These question types are offered in addition to the **Custom Library,** the default library that appears when adding a new question to your survey. Displayed on the left of the **Custom Library** questions are several other question libraries that may also be of interest.

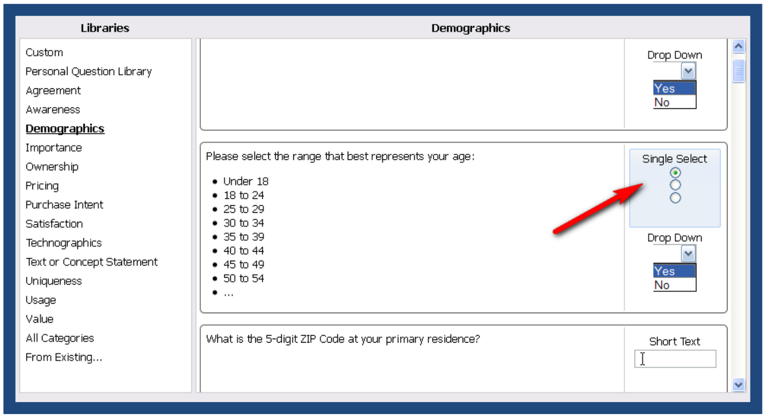


Similar to the preformatted surveys that were discussed on page **11**, InsightExpress also offers a bank of pre-constructed survey questions that you may use within any survey you are constructing. Simply choose which questions you would like to use as a template, and edit each to suit your specific needs.

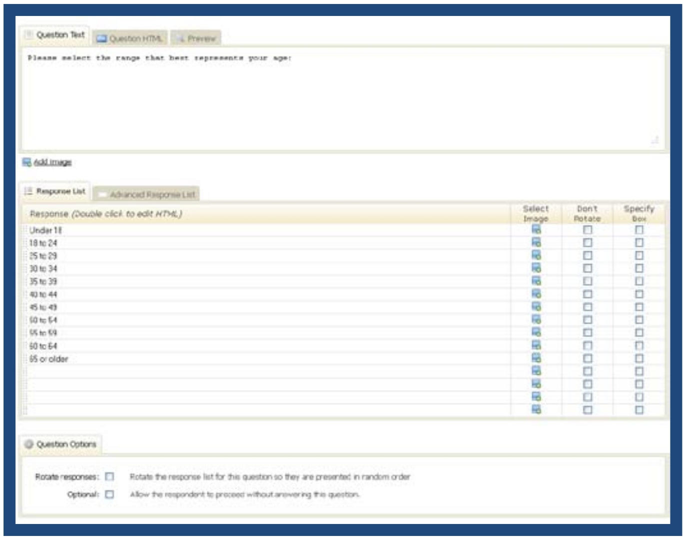
For Example, the **Demographics Library** is selected below:



This library offers several demographic question templates including gender type, age range, and marital status. You may also customize the question type for each (for example a drop down or a radio button as shown above).
The image below illustrates how to add the age question, formatted as a Radio Button, into a survey:



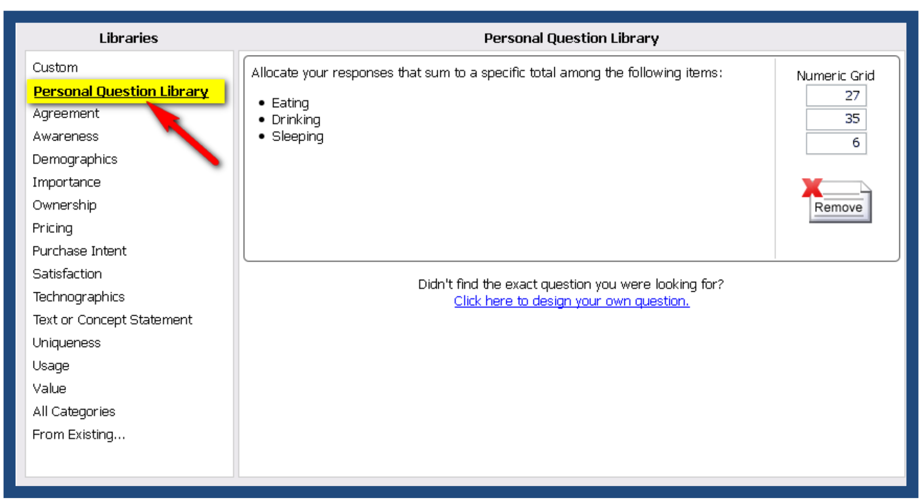
You then have the ability to edit the question text, as well as response rows and question options:

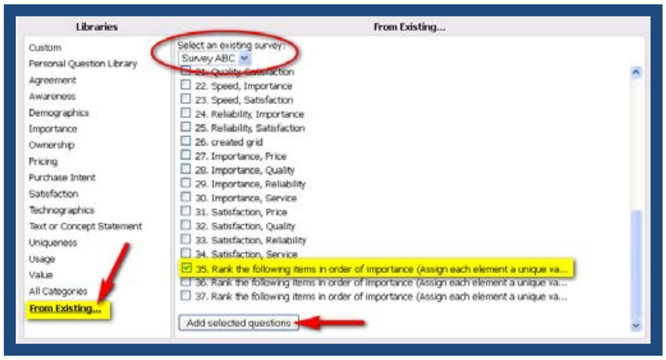


If you would like to save any question that you have built in your survey in order to use it in a future survey, click on the question in **Sequence Questions** and choose, **Edit**.

Next, simply scroll to the bottom of the question editing page and choose **Add to Library**.

The question will now be archived in the **Personal Question Library**:



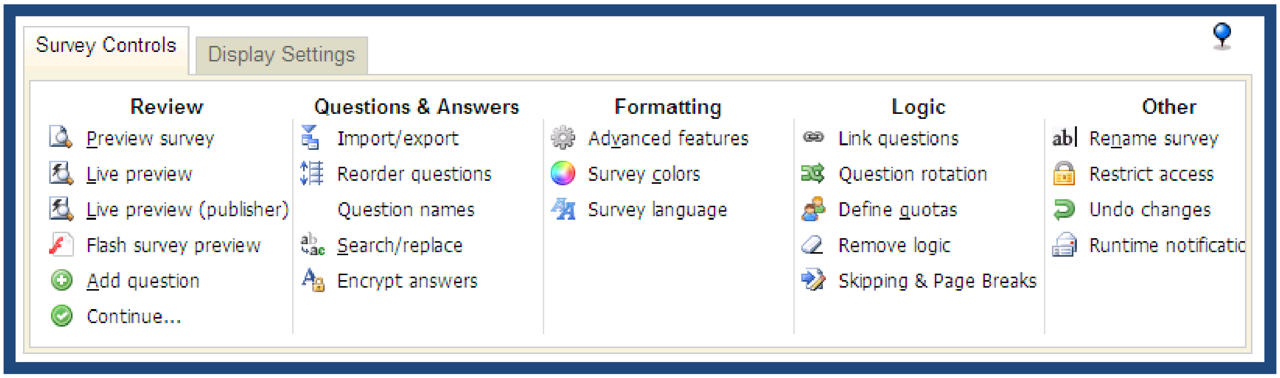


By choosing **From Existing** from the menu, you may add questions from a survey that is being edited, already running or completed.

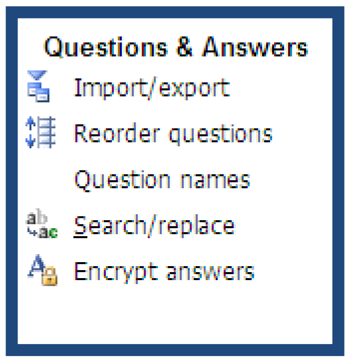
To begin, select the existing survey from the drop down list. All surveys that are in your “My Surveys” page or that you have sharing rights to will be available under this drop down.

Next, check off the question or questions from the existing survey that you wish to add to your new survey. Once these questions have been selected, scroll to the bottom of the list and click on “Add Selected Questions” button.

6. SURVEY CONTROL BOX



a. Questions and Answers

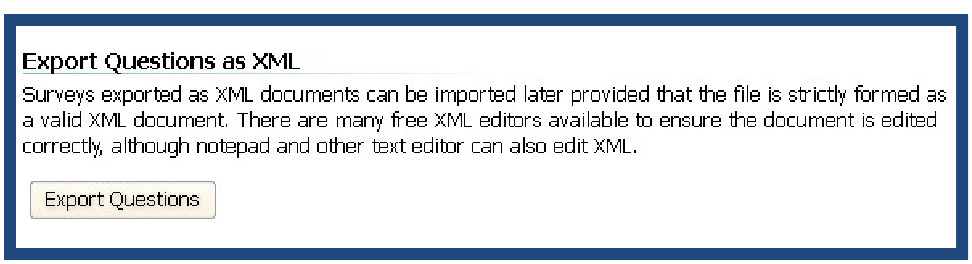


i. Import/Export

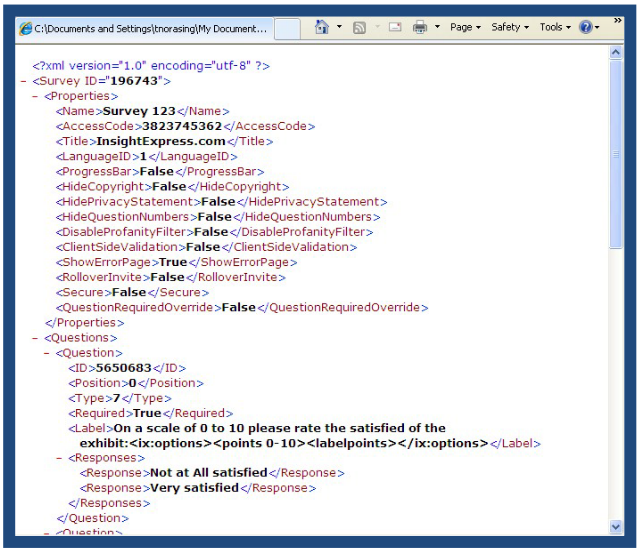
To export a survey into a text file, click on the **Import/export** link in the **Survey Controls** box.

Export Questions as XML:

By selecting the option to Export Questions as XML, you may export your entire survey (not just a question) to an XML file.



When selecting Export Questions option, a new window will appear containing the survey's html coding.




```
<?xml version="1.0" encoding="utf-8" ?>
- <Survey ID="196743">
 - <Properties>
    <Name>Survey 123</Name>
    <AccessCode>3823745362</AccessCode>
    <Title>InsightExpress.com</Title>
    <LanguageID>1</LanguageID>
    <ProgressBar>False</ProgressBar>
    <HideCopyright>False</HideCopyright>
    <HidePrivacyStatement>False</HidePrivacyStatement>
    <HideQuestionNumbers>False</HideQuestionNumbers>
    <DisableProfanityFilter>False</DisableProfanityFilter>
    <ClientSideValidation>False</ClientSideValidation>
    <ShowErrorPage>True</ShowErrorPage>
    <RolloverInvite>False</RolloverInvite>
    <Secure>False</Secure>
    <QuestionRequiredOverride>False</QuestionRequiredOverride>
   </Properties>
 - <Questions>
   - <Question>
      <ID>5650683</ID>
      <Position>0</Position>
      <Type>7</Type>
      <Required>True</Required>
      <Label>On a scale of 0 to 10 please rate the satisfied of the
        exhibit:<ix:options><points 0-10><labelpoints></ix:options></Label>
    - <Responses>
        <Response>Not at All satisfied</Response>
        <Response>Very satisfied</Response>
      </Responses>
     </Question>
```

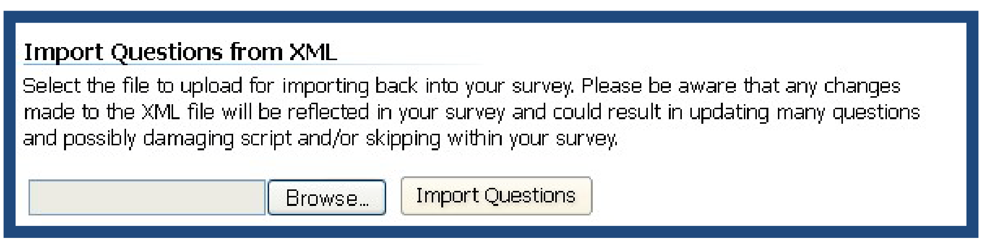

The beginning of this document outlines survey properties. This section is followed by the survey's questions and response choices. Updates can be made to the **bolded black text** (except for the question ID number). Question type values (the values that identify the question type) can be found under *Question Type Examples for Importing and Exporting* (later in this section).

Import Questions as XML:

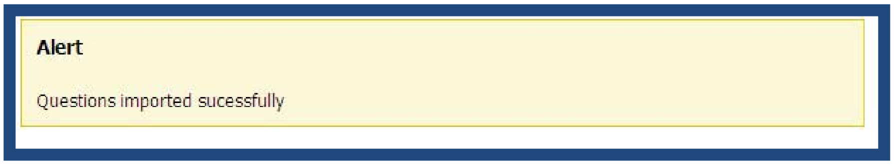
Please save the XML file to your computer after making any edits.

To merge these edits with your survey:

1. Return to the Import/Export section of your survey.
2. Select **Browse**
3. Choose the new survey file and click **Import Questions**.

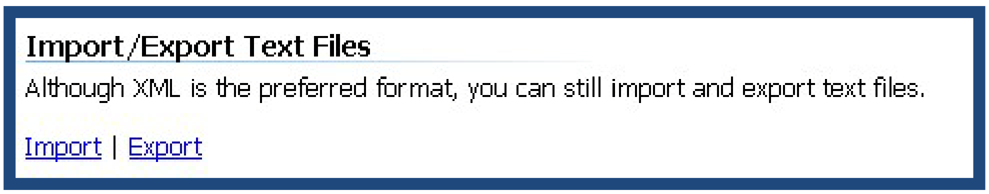


Once you have imported your revised questions, you will receive the following notification:



Your edited questions will appear on the Sequence Questions Page. They may be modified as if they were created within the online survey tool.

Import/Export Text Files:



To export your survey into a text file:

1. Select **Export**

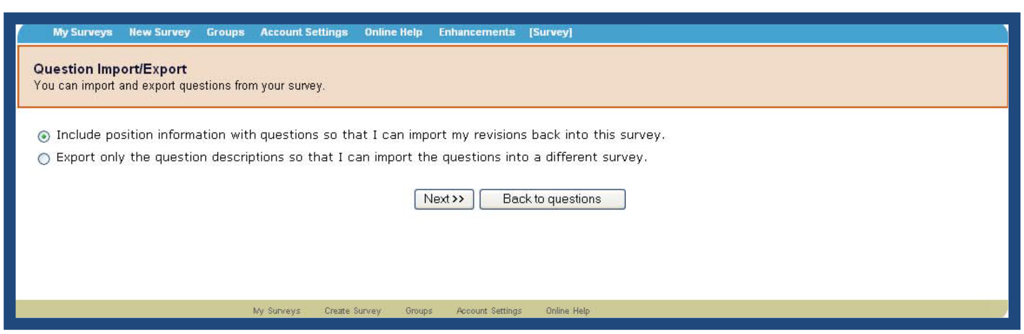
The next screen will present two exporting choices.

2. Depending on your intent, you may select either:

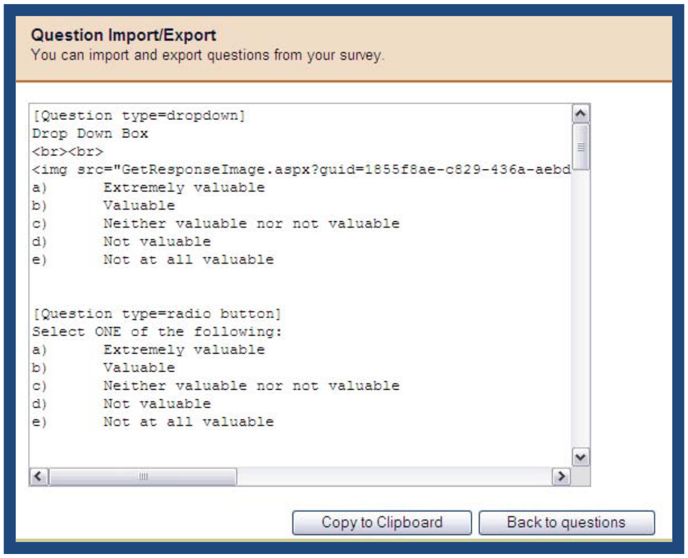
• *Include position information with questions so that you can import my revisions back into this survey (recommended)*

Or

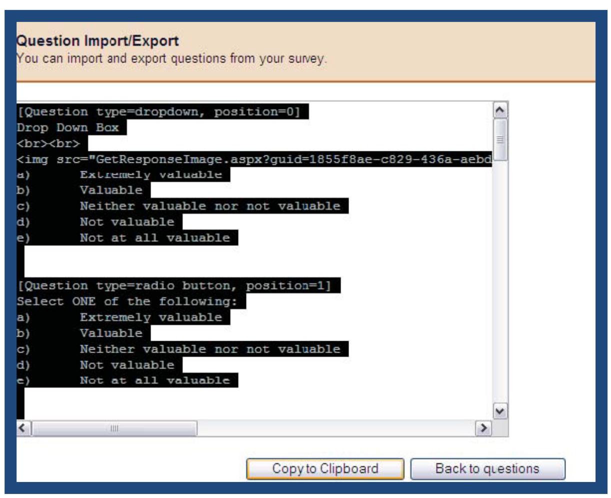
• *Export only the question descriptions so that you can import the questions into a different survey.*



If you select **export only the question descriptions**, the survey will appear as shown below, but without the position information for the questions. When importing this exported file, the system will put them in the order that they are listed, as opposed to the position in which you would like them to appear.



3. Once the new survey has been pasted into a text file, select **Back to questions** to return to the survey and continue. At this point you may preview, edit or even launch your survey.

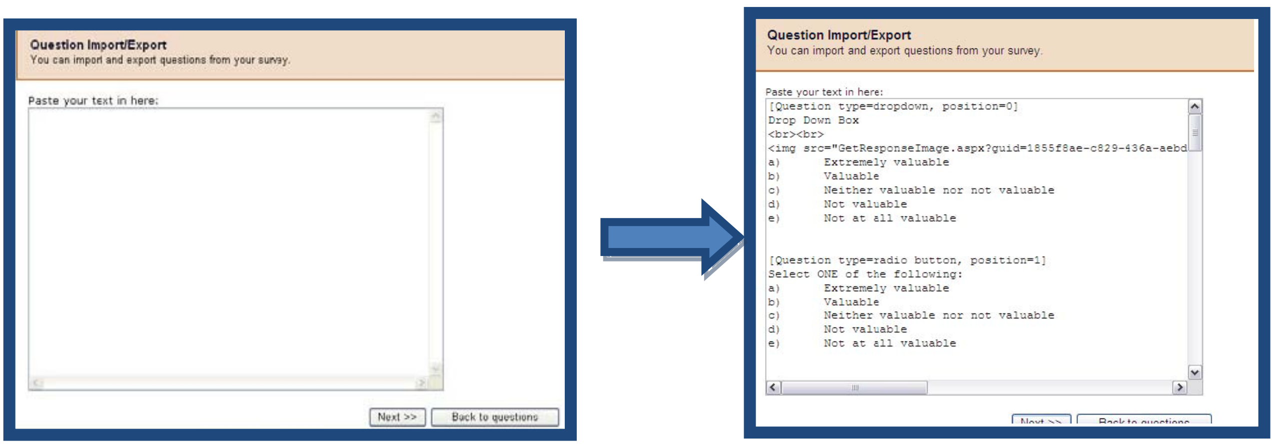


To import your survey from a text file:

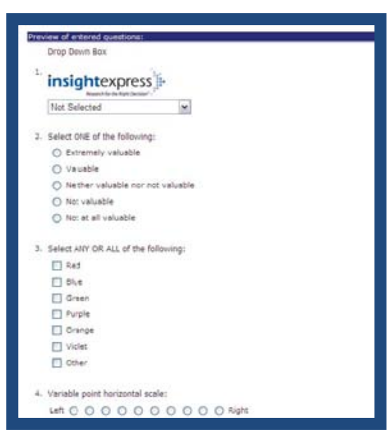
1. Select **Import**

*__*Please note:__ When importing a survey into your account, specific formatting is required to determine the question type, question number, number of answer choices, etc. For the specific formatting question type examples, please see Question Type Examples for Importing and Exporting (later in this section).*

2. Paste your text into the box provided.



3. Choose **Next**
4. You will then preview the final layout and structure of your imported survey questions. You may select **Next** to finalize the import process, or select **Back to questions** to return to your main survey edit page.

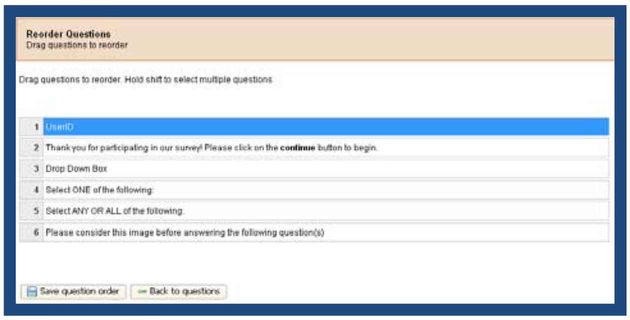


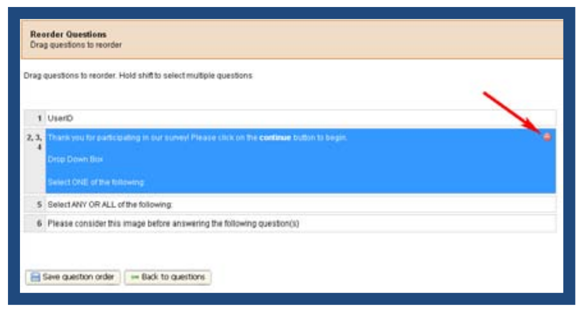
***Please note:** By default, all imported questions will be set as optional.*

ii. Reorder Questions

This feature allows you to easily move one or more questions throughout your survey. You may also use this feature to delete multiple survey questions at once.

To reorder a block of questions, select the first question of the block. Then, hold down the “shift” key on your keyboard and select the last question of the block. Doing so will also select all questions in between. Then, you will be able to click-and-drag this block to re-order these questions within your survey.

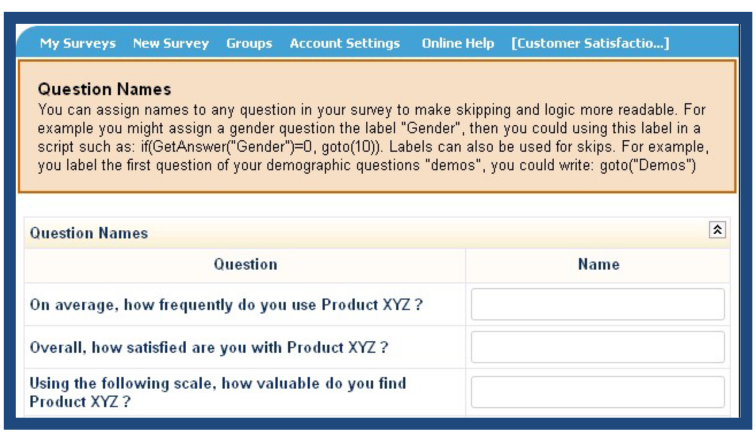




If you would like to delete selected questions, select the “-“ icon located within the upper right-hand corner of the block (as indicated in the image to the right). Once you have finished re-ordering your questions, select **Save question order.**

iii. Question Names

InsightExpress also gives you the ability to name each of your survey questions. This feature can help make referencing or reading question logic much easier.

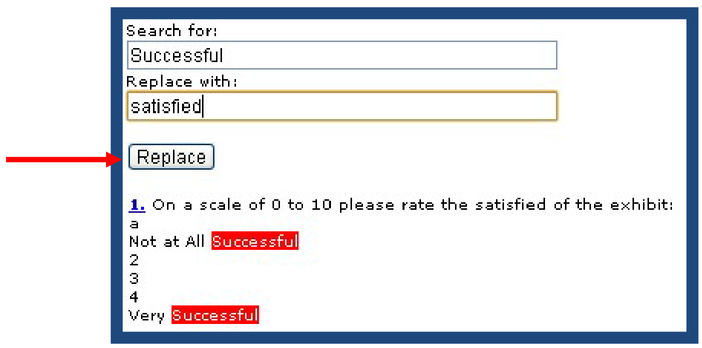


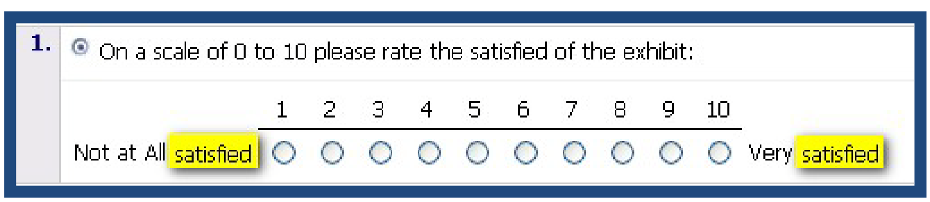
v. Search and Replace

This feature allows you to search for words in surveys that you would like to replace.

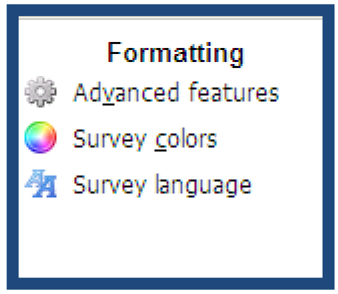
Type in the word (case sensitive) or phrase you would like to find in your survey and click on the **Search** button. The screen will then return all instances of the word or phrase as listed in your search criteria.

You then have the option to replace this word or phrase with new text. By entering the new word or phrase in the **Replace with** box and clicking the **Replace** button, all found criteria will be replaced with the new text.

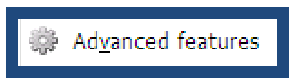




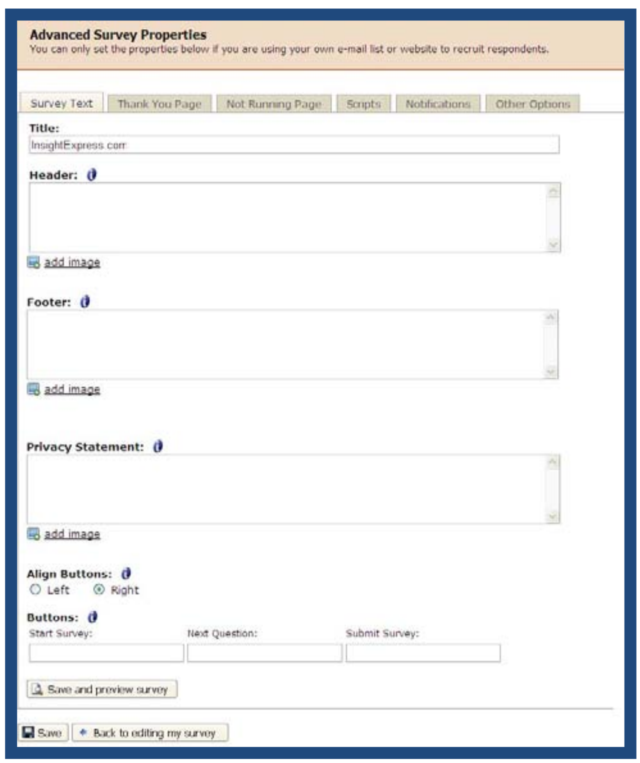
b. Formatting



i. Advanced Features



When providing your own respondent list, email lists, or web site respondents, you have the option to modify your survey's header, footer, thank you page or thank you URL through **Advanced Features**.



There are six tabs that comprise the Advanced Features option:

Survey Text: Allows you to enter information (or images) to modify the window title, header, footer, survey buttons, and privacy statement.

***Please note:** Survey headers and footers will appear on every page of your survey, including the Thank You page.

Thank You Page: This section contains your survey's default Thank You and Not Running Pages. The Thank You Page is shown to respondents who successfully complete your survey or are terminated. However, the Not Running Page will be shown to respondents who attempt to access your survey after it has reached its defined number of target completes, or if the survey has been paused or closed prematurely. Both pages allow the use of custom survey scripting to further customize the messages shown to respondents. You may also insert a calendar invite into your survey (event links must be generated by your internal IT team).

This page also allows you to modify the Thank You/Not Running Page URL presented to those respondents (be sure to use the entire URL starting with "http"). If you would instead like to **redirect** respondents to a webpage, simply leave the Thank You/Not Running message field blank and insert your URL into the URL box provided.

Alternate Thank You Pages: As opposed to the Thank You Page (above), the Alternate Thank You pages allow you to more easily customize the thank you pages shown to respondents visiting your survey. These pages may be enabled **<u>in place of the default Thank You Page</u>** via a toggle at the top of the **Advanced Features** page. This page contains **<u>proprietary</u>** message/URL fields based upon the following respondent completion statuses:

- **Completion**: Respondents who complete your survey. This message will not be shown to respondents who terminate due to scripts, quotas, or who attempt to access your survey after it has been closed.
- **Terminate**: Respondents who are disqualified based upon respondent termpoint or scripted logic criteria.
- **Over Quota**: Respondents who attempt to take the survey after a defined respondent quota has been met.
- **Not Running**: Respondents who attempt to take the survey after the survey has been closed because it has reached its defined number of completes, or if the survey has been paused or closed manually or via scheduling.

****Please Note:*** *If the Alternate Thank You Page messages are set as the default thank you messages within your survey, scripting and message content* ***<u>will only apply to respondents who meet the appropriate survey completion status.</u>*** *For example, any scripting/message content placed within the Terminate section* ***<u>will only apply</u>*** *to respondents who* are **<u>disqualified based upon respondent termpoint or scripted logic criteria</u>**.

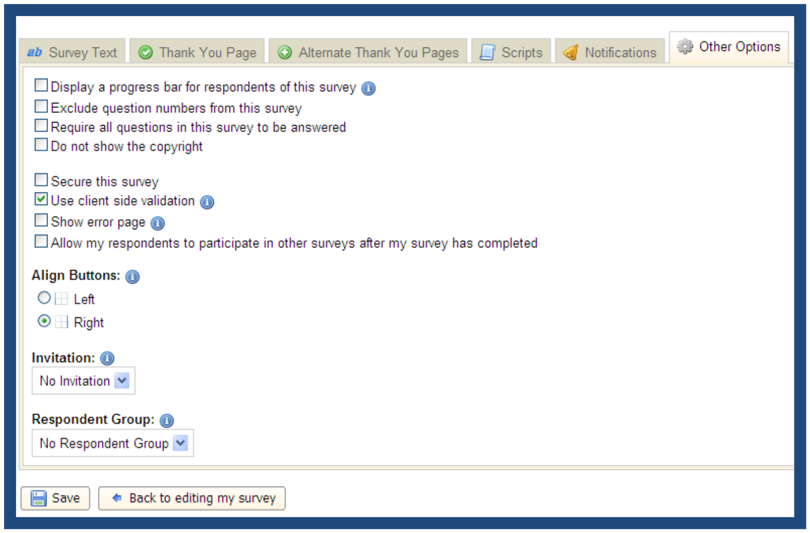
Scripts: Allow s you to insert preload scripts into your survey. These will be read before the

respondent is shown any survey questions.

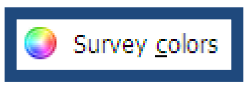
Notifications: Allows you to send an automated email to a specified email address whenever your survey launches and/or completes. If you would like status emails sent to additional contacts, simply enter additional email addresses using a line break between each.

Other Options: The last tab under Advanced Features is the **Other Options** tab. These options include:

- **Display a progress bar**: Shows respondents how far along they are in the survey as they progress.
- **Exclude question numbers from this survey**: Allows you to remove the question numbers from the survey.
- **Require all questions in the survey to be answered**: Forces all questions, including those that are created as optional, by default.
- **Do not show the copyright**: Gives you the option not to show the InsightExpress copyright.
- **Disable the profanity filter**: Allows you to see all verbatim responses in your results regardless if any profanity was included.
- **Secure this survey** allows you to make your survey secure and have a URL that begins with https://
- **Use client side validation**: Allows respondents to continue through the survey when they skip a question even if all questions are required.
- **Show error page**: Allows you to show a separate error page for unanswered required questions.
- **Invitations:** Allows you to display an invitation before the first page of your survey if you are fielding that survey to your website visitors.
- **Respondent Groups:** to have only a certain set of respondents enter the survey or you have pre-populated some questions. For additional information on creating respondent groups, please refer to page **89**.

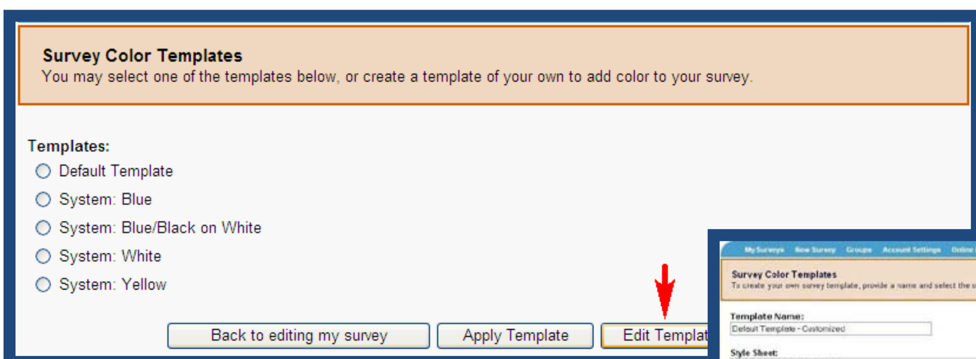


ii. Survey Colors

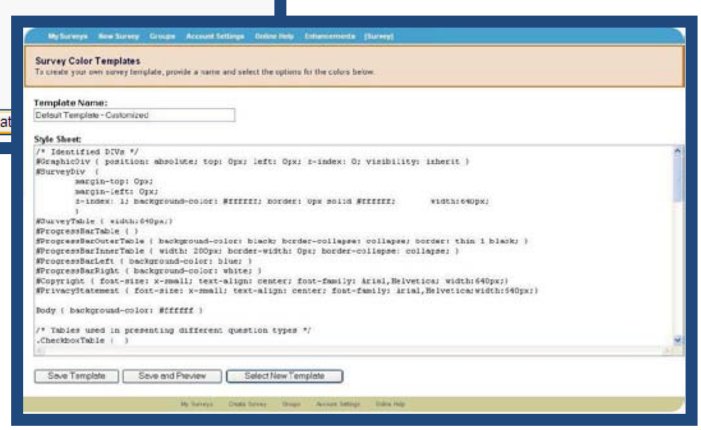


In order to help clients comply with branding guidelines and/or facilitate personal preferences, various aspects of the survey, including colors, text, background, font type and size, may be modified under the **Survey colors** option.

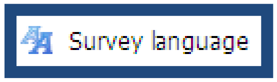
You can adjust a template by clicking on **Default Template**. The survey templates use cascading style sheets (CSS). Cascading Style Sheets are a style sheet mechanism that allows authors and readers to attach style to web pages to control color, font and layout of the survey.



Select the **Default Template** and click **Edit Template**.



iii. Survey Language



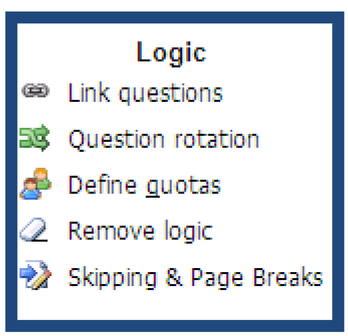
Your survey directives (i.e., error messages, progress bar, Next Question and Submit Buttons) can be launched in any of the foreign languages listed below.

Below are the languages available when providing directives to respondents. Directives include messages to respondents prompting them to provide mandatory information, “Next Question” controls, etc. When programming your InsightExpress survey in another language, you may select any of the corresponding languages below:

●Chinese-Simplified	●French-European	●Korean	●Spanish - European
●Chinese-Traditional	●German	●Malaysian	●Spanish - Latin America
●Czech	●Greek	●Norwegian	●Spanish - North America
●Danish	●Hindi	●Polish	●Swedish
●Dutch	●Hungarian	●Portuguese - Brazilian	●Tagalog
●English	●Indonesian	●Portuguese - European	●Thai
●Finnish	●Italian	●Romanian	●Turkish
●French-Canadian	●Japanese	●Russian	

****Please note:*** *changing the language will only impact the directives of the survey. The actual survey will not be translated. The survey itself will need to be translated into a specific language before programming. If you would like your survey itself to be translated, please contact your InsightExpress Account Representative as this would incur additional charges.*

c. Logic



i. Link Questions

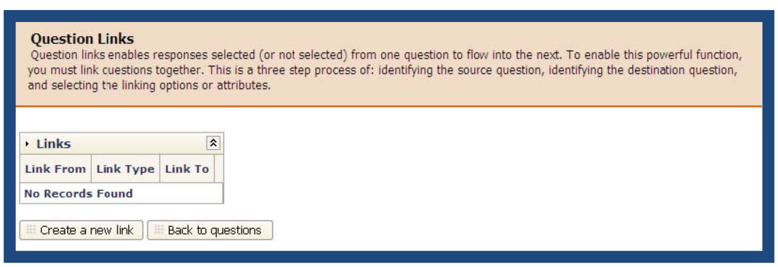
With the **Link Questions** option, you can pipe responses that were selected (or not selected) from one question into another. With this feature, the responses available for one question will depend upon that respondent's answers within a previous question in the survey. To enable this powerful piping function, you must follow a three-step process.

1. Identify the source question
2. Identify the destination question
3. Select the appropriate piping options or attributes

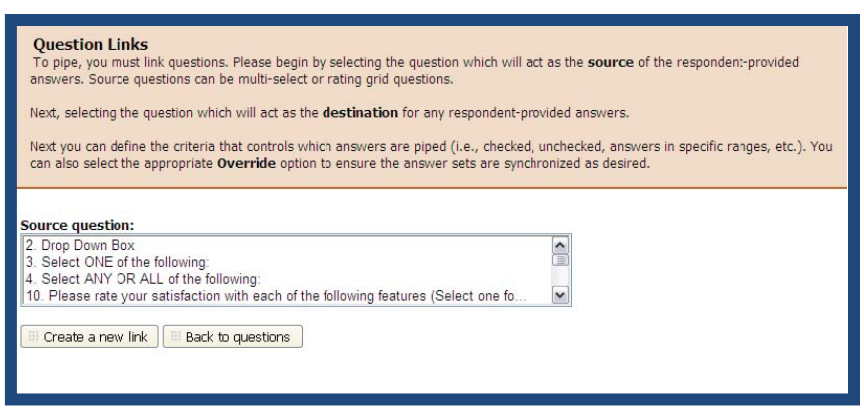
****Please note:*** *This tool can only be used with certain question types. Also, depending upon the source question, only certain link types are available. The available question/link type combinations are:*

Source Question	Destination Question	Link Types
Single Select	Single Select	Questions not selected
Multi-Select	Single/Multi-Select	Questions checked/unchecked
Grid Questions	Single/Multi-Select	Values greater than/less than/equal to x

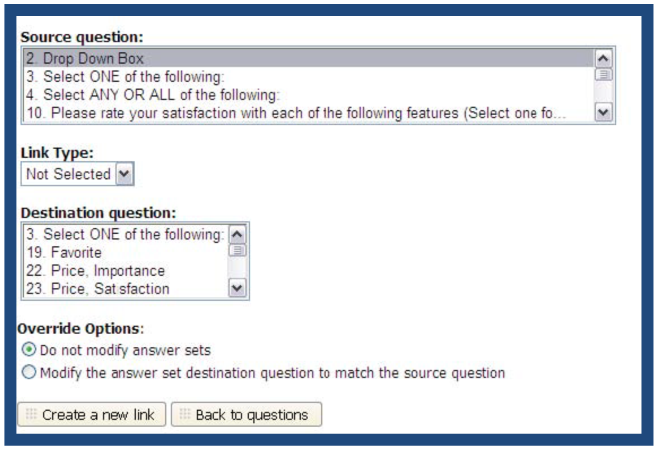
First, select "Create a new link".



Next, specify the source question for the link being made. If your survey contains questions that can be used as a source question, they will appear in the box below.



Once you select the source question, the page will refresh itself and present you with three more options: **Link Type, Destination Question,** and **Override Options.** The next step when linking questions is to select the destination question.



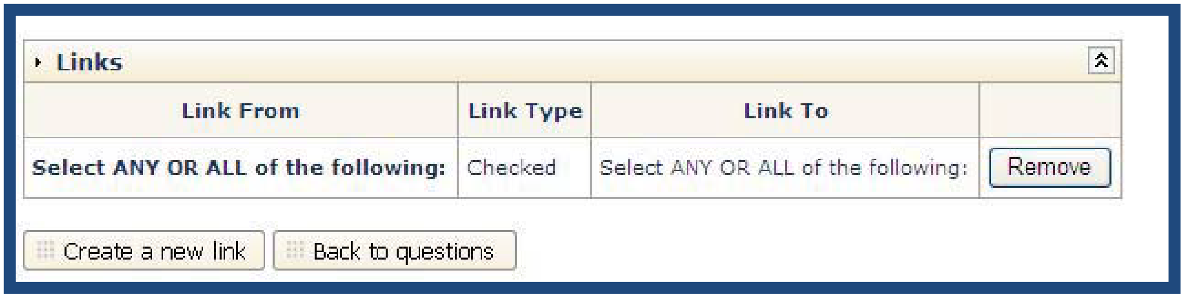
__Please Note:__ In order to properly link questions, the answer set for the destination question must match the answer set for the source question.

Once you select the destination question, you must specify:

- **Do not modify the answer set**: This leaves the answer sets of the source and destination question untouched. An example where this option would be appropriate would be if your source question had a response choice of "None of the above" and you wanted to hide this from the response set of the destination question.

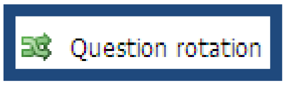
- **Modify the answer set**: This edits the response set of the destination question to match the source question. In order for the linking feature to work properly, the answer sets for the source question and destination question must be identical. If you believe that the answer choices are not identical, this would be the appropriate option to select.

After you set up the features for the link, you click on Create Link.
The next page will show you the link that you have created:



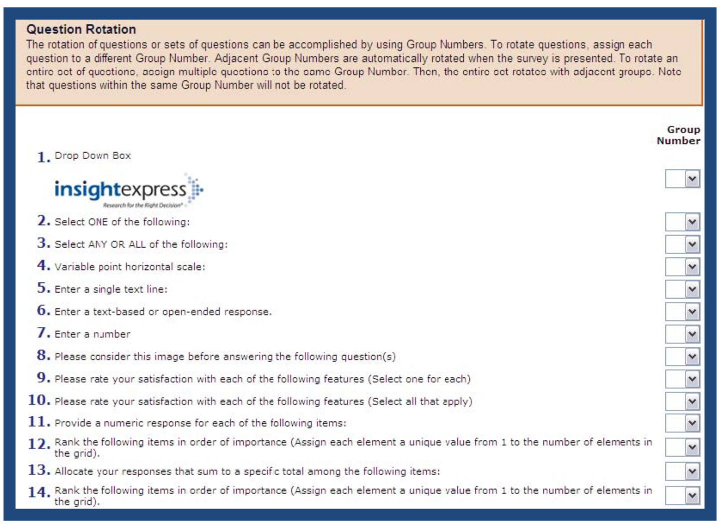
It will also show you the source question, the link type, and the destination question. You will have the option to modify the link or remove the link when it is no longer necessary.

ii. Question Rotation



Question Rotation allows you to rotate the presentation of a question or a series of questions to prevent all respondents from seeing those questions in the same order.

For example, you may wish to show 3 concepts and ask if respondents would be interested in purchasing them. By setting **Question Rotation**, respondents will not always see the same concepts first, reducing the potential for bias selections.



Two options are available when rotating questions:

- rotate single questions
- rotate a set of questions

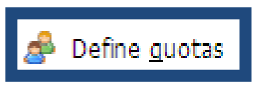
To rotate single questions, you must assign them consecutive values. (For example, if you are rotating 3 questions, each question will be assigned a different value: 1, 2, 3.)

If you are rotating a set of questions, individual questions within each set will have the same number, but the numbers will be different between the sets. (For example, if you are rotating 3 sets of questions with 5 questions in each set, the numbering scheme would be: 1,1,1,1,1 / 2,2,2,2,2 / 3,3,3,3,3; respectively).

***Please note:** For Group Rotation to work properly, single questions or groups of questions may only be rotated if they are built in chronological order. (For example: 1, 2, 3 is acceptable but 1, 5, 7 is not acceptable.)*

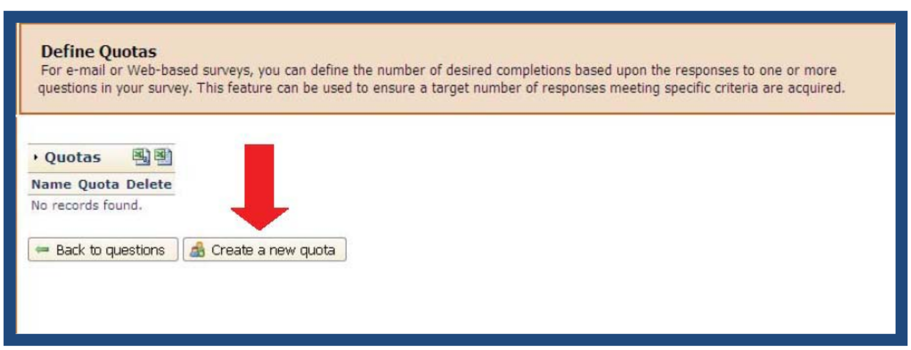
***Please note:** Group Rotation does not always function properly with selective presentation rules. Instead of Group Rotation, you may need to apply scripted skips to ensure respondents are rotated properly. Please contact InsightExpress support if you require assistance with this.*

iii. Define Quotas



You may use **Define Quotas** to define the number of maximum completions based upon the responses to one or more questions in your survey. This feature can ensure that a target number of responses, meeting specific criteria, are collected. Quotas can be used for surveys launched through either **My Opt-in Email list** or **My Website Visitors** (these targets are designated upon launching your survey). For a detailed description of these audiences, please refer to **Selecting the Target Audience** on page **102**.

To create a new quota, click “Create a new quota”.



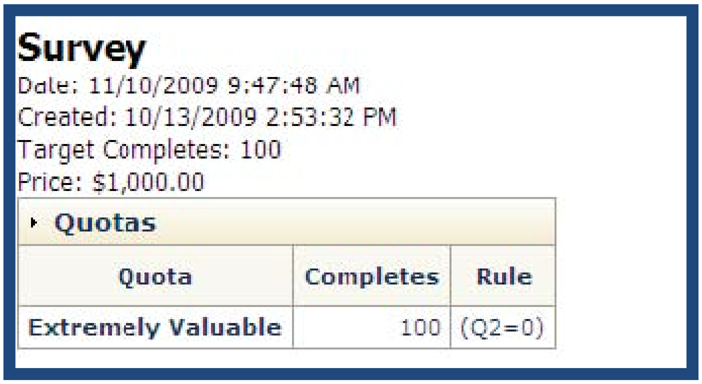
Next, name the quota and assign a quota size. Quotas can be used to exclude respondents who do not qualify for your audience. They can also put a cap on completes that answer a question in a certain way, although they should not be used to capture minimums.

After naming the quota and setting the quota size, you will choose the answer choice associated with the quota. Simply check off the checkbox associated with the answer choice and then save the quota.

Once the quota has reached its target number of completes, respondents will be sent to the Thank You Page of a survey and **not counted as a complete.**

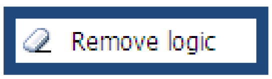
Once the quota has been saved, you will see the quota in the quota table when you return to the **Define Quotas** page. It will display the quota name, the quota amount and the option to delete the quota. You will also be able to export this table to a CSV file or an Excel file by selecting the appropriate icon on the top right hand of the table.

The quota rule will also appear on the Printer Version of the survey:

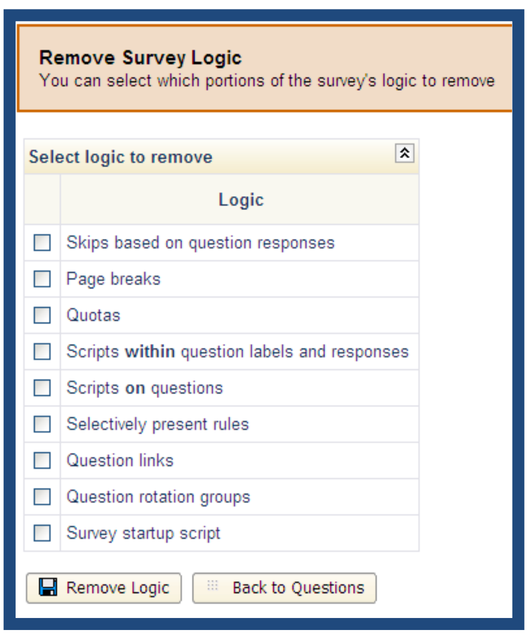


If you add or delete questions or answer choices before setting your quota rule, you will have to update the quota by editing it. It is best to set your quotas after the survey is finalized.

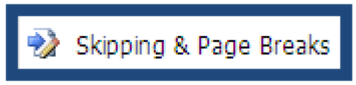
iv. Remove Logic



If, for any reason, you would like to remove logic from a survey, you can do so using the **Remove Logic** option. When selected, the following page will list all logic and scripts. As a final step, select the logic you wish to remove and select the 'Remove Logic' button at the bottom of the page. The indicated logic should no longer be found within the survey.



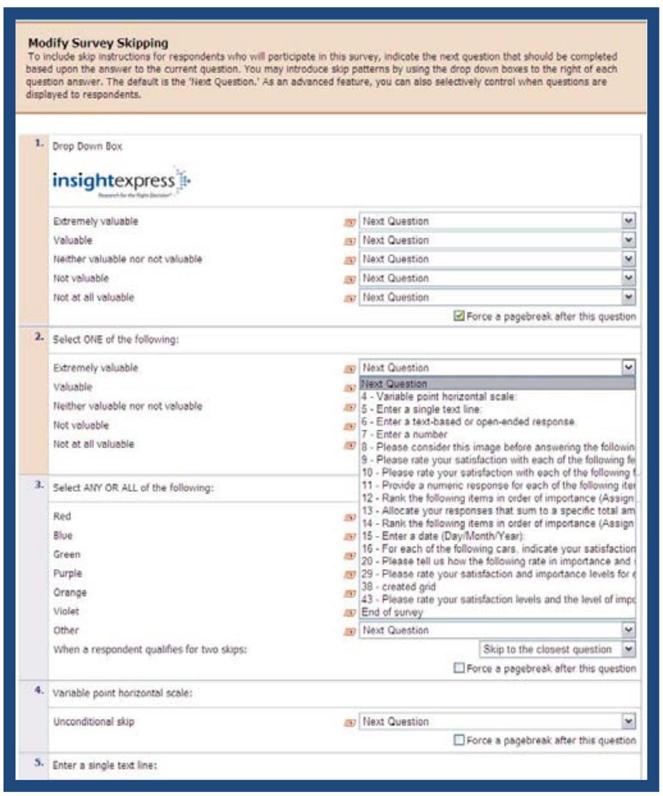
v. Skipping & Page Breaks



Click on **Skipping & Page Breaks** to adjust your survey's skipping logic and add page breaks between questions. This feature is used to add multiple skip patterns based on respondent answer choices. You can only program your survey to have respondents skip forward.

***Please note:** When adjusting question skipping logic, a page break will be automatically placed after any question that contains any skipping logic. These page breaks are required to ensure that survey skips are read properly.*

On this page, you will be able to scroll through each question in your survey. In addition, a drop down box will be displayed to the right of each response row within your survey. Using these drop own boxes, you are able to select where you would like respondents to skip to in after having selected that particular response.

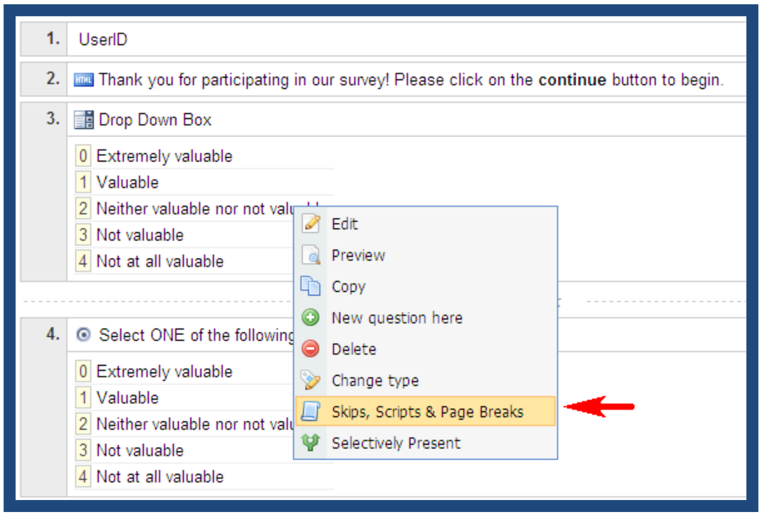


From this page, you are also able to force **page breaks** by checking off the "Force a page break after this question" checkbox.

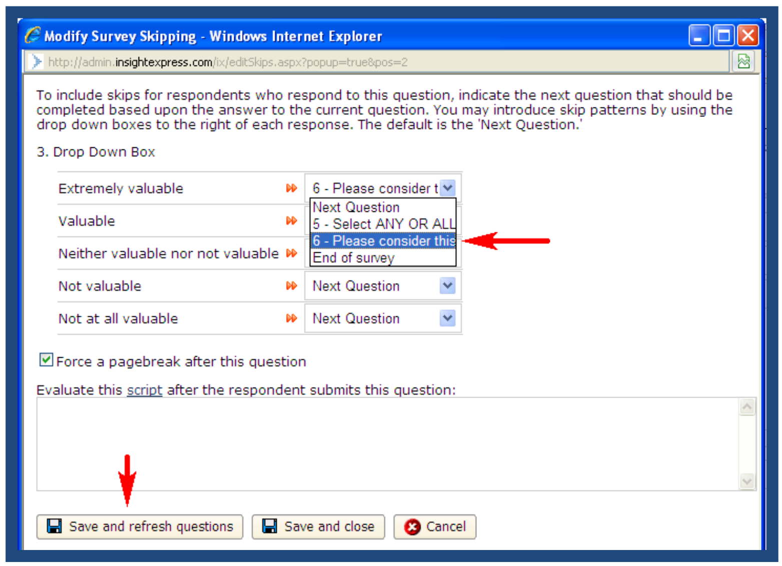
***Please note:** Page breaks help to avoid lengthy pages. Often times, when a page is too long, a respondent may not notice error messages above questions. The survey refreshes to the top of the page when an error is submitted. Adding page breaks after every 1-3 questions minimizes respondent fatigue by eliminating scrolling. Page breaks allow respondents to answer questions in manageable sections to ensure more complete data capture.*

***<u>Defining Skip Rules by Question</u>*- Skip patterns are used to skip respondents over certain questions based on their responses to previous ones. Skip patterns can be set up in multiple ways.

While in edit mode, click on the question requiring the skip pattern and choose the **Skips, Scripts & Page Breaks** option.



Once you choose **Skips and Scripts,** a new window will appear which will allow you to set your desired skip pattern. As shown in the example below, respondents answering “Extremely Valuable” to question 3 can be skipped directly to question 6. In order to program this skip pattern, question 6 was selected via the corresponding drop box for that response.



You can use these drop down boxes to apply skip patterns to both single-select and checkbox question types. However, please be careful when adding skips within checkbox questions as this question type allows respondents to select multiple responses within in a single question. In most cases when working with checkbox questions, you would only apply a skip on a response that is mutually exclusive (i.e. “None of the above” or “Do not know”). In these cases, doing so will prevent those respondents from seeing any follow-up questions intended for other, qualifying respondents.

As a note, drop down skip patterns (as shown above) cannot be defined for grids. In these cases, you can use selective presentation to show a follow-up question based on a grid response, or you can write a script in order to direct a respondent to a specific question number. You can reach out to InsightExpress support for more tutelage on written skip patterns.

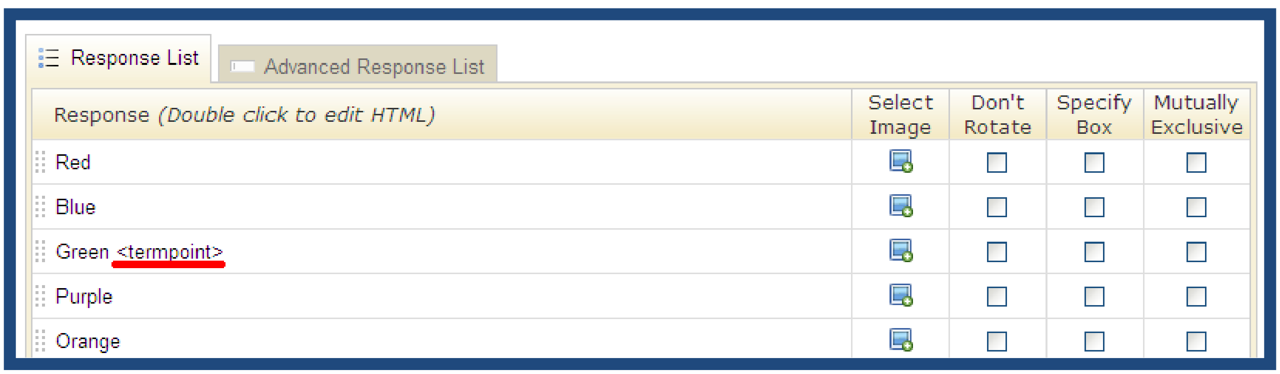
Skip patterns cannot be defined after a grid answer row. In these cases, the entire grid question must first be answered in order to skip respondents to the next appropriate question.

Also available within this window is the option to **insert a page break**. By checking the box

Force a page break after this question, a page break will be generated between the question that you are working on and the following question.

- **Save and refresh questions** will save the skip patterns added, close the window and refresh the Sequence Questions page. (This applies if you are displaying the skip patterns on the Sequence Questions page via the detailed view.)
- **Save and close** will save the skip patterns added and then close the window to return you to the Sequence Questions page. The Sequence Questions page will not be refreshed.
- **Cancel** will not save any changes made to the survey program but it will close the window and return you to the Sequence Questions page.

Please note: If you apply a skip to "End of Survey", respondents answering this way will be counted towards your survey's target completes and their data will be collected. If you would prefer for these respondents to* ***terminate* *from the study and* ***not be counted towards your target completes or online data****, you may add the termpoint tag,* ***<termpoint>*** *directly within the appropriate response row.*

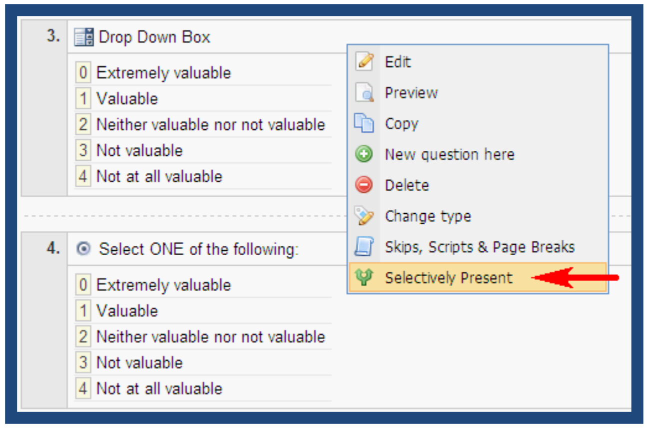


v. Selectively Present

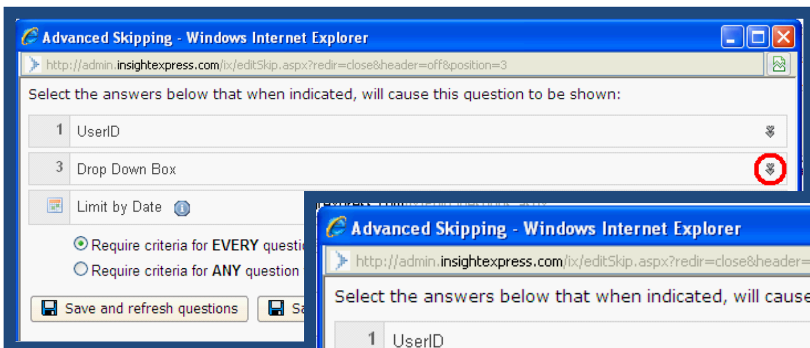
Selectively presenting a question allows you to only show a question based upon how a respondent answered a previous one. Doing so will allow you to make complicated skips without the use of scripting commands.

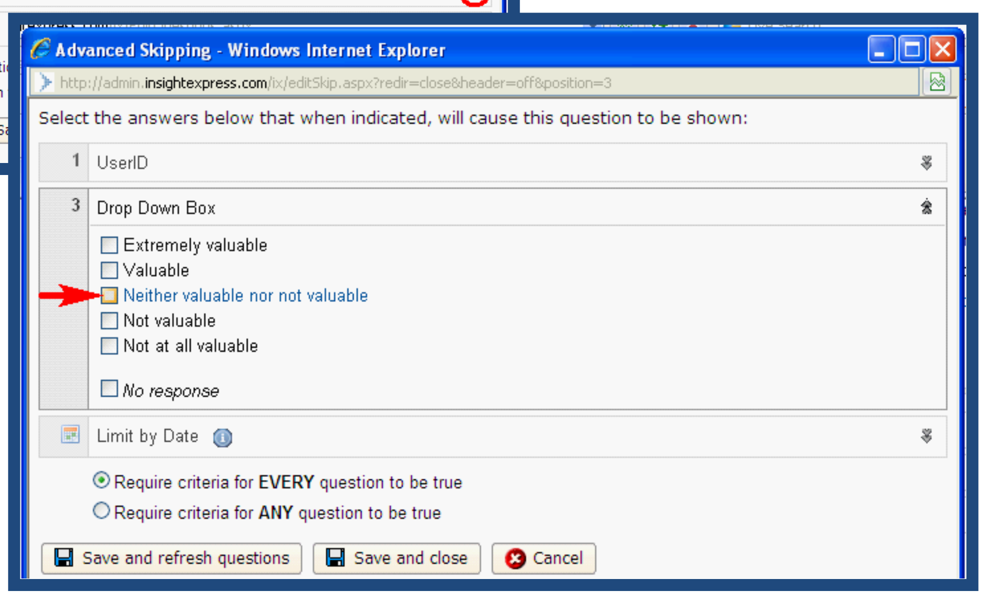
You will find this option by left clicking on the question you would like to selectively present and choosing the corresponding option in the drop down box.

In the example below, when you left click on question 4 and click on **Selectively Present** within the drop down menu, a similar pop up window will be shown.



In order to see the individual responses within a question, you must select the arrow indicated below**.** Then, you may select the responses which you would like to selectively present that question to.





As you can see, the same options that apply to skipping also apple to selective presentation: Save and refresh questions, Save and close, and Cancel.

As shown above, selective presentation rules can also be driven by date. These additional options can be found at the bottom of the window under the **Limit by Date** section.

**__Please note__: Selectively presenting a question based on more than one answer choice within the same question, will create an "OR" function. So, if __any__ option of the checked responses is selected, the selectively presented question will be displayed. If the selectively presented question is based off two or more questions, this will create an "AND" function. So, all*

conditions must be met. For questions or assistance with complicated skipping/selective presentation rules, you may contact InsightExpress Customer Support.

vi. Scripting

Whether you are asking a question in the beginning, middle, or the end of a survey, the **Scripting** feature will allow you to create more complex skip patterns for survey questions.

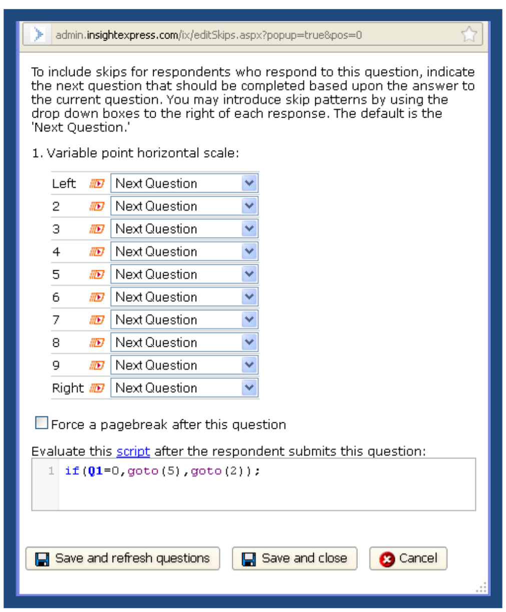
For those interested, in a more detailed overview of our scripting, there is an additional training manual available on this topic.

To create scripting commands for your survey you must use “if” and/or “goto” statements.

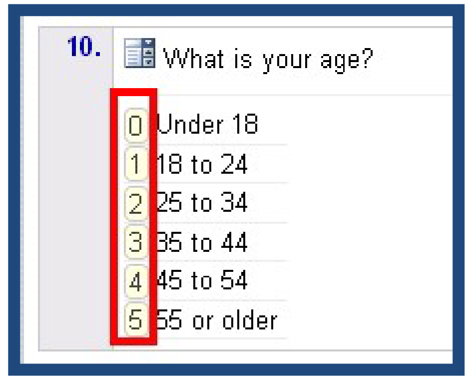
To add scripting commands, click on the question that the script applies to, and then click on **Skips and Scripts.**

Here is a sample script command:

if(Q1=0,goto(5),goto(2)); That is, if in question 1 the first answer choice is selected, skip to Question 5. Otherwise go to Question 2.



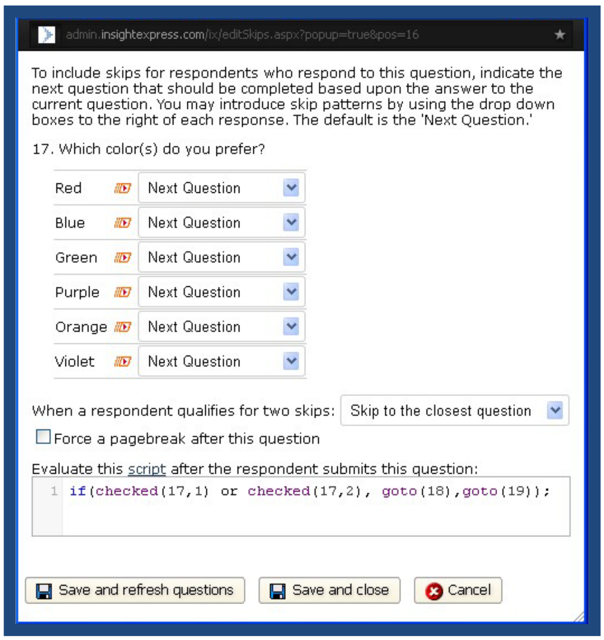
***A note on Coding:** When scripting for most single select questions (radio, button, drop down, single select grid), the first response choice is coded from 0-N (refer to image to the right). However, multiple select questions are coded from 1-N. If unsure of any coding or scripting within your survey, please contact InsightExpress Support.



You may also combine login in the form of "and/or" scripts:

<u>**OR Scripting**</u>

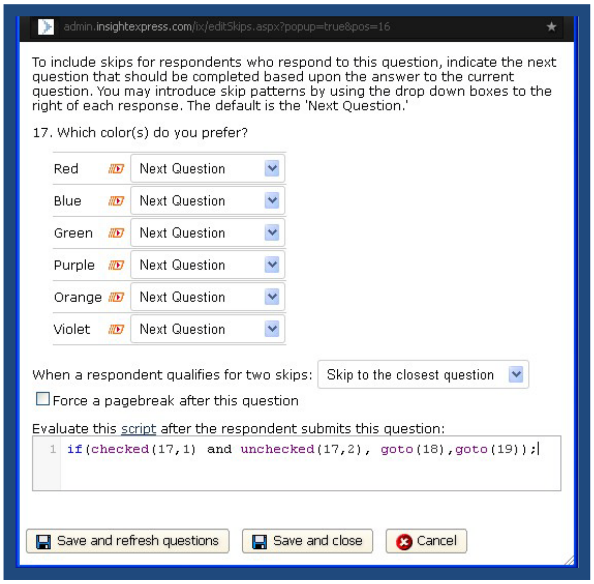
if(checked(17,1) or checked(17,2), goto(18),goto(19));



Sometimes you may need to ask specific questions based on a certain answers that a respondent selects. In this example, if a respondent indicates they prefer the colors red (Q17,1) or blue (Q17,2) they should continue to Q18. For all other answers, they should skip one question ahead, to Q19.

AND Scripting

if(checked(17,1) and unchecked(17,2), goto(18),goto(19));



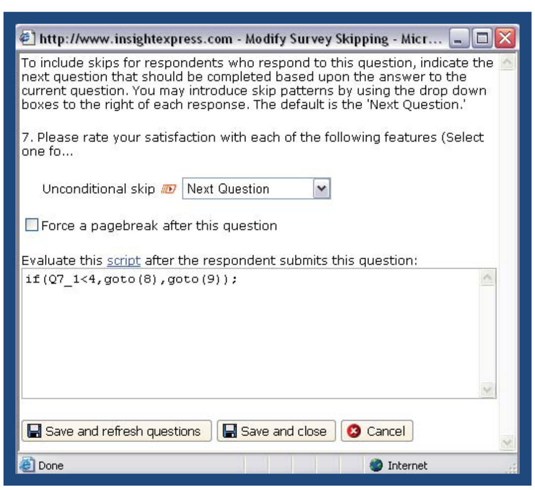
In this example, notice that "unchecked" may also be used to note whether an item has **not** been selected by the respondent. Based on the script above, if a respondent indicates they prefer the colors red (Q17,1), **but does not prefer** blue (Q17,2) they should continue to Q18. For all other answers, they should skip one question ahead, to Q19.

****Please note****, *you can change the command to "or" / "and."*

- By using **Scripting Commands** or the **Selectively Present** option you will be able to capture why respondents give specific ratings to individual features or attributes.

For example:

- "if(Q7_1<4,goto(8),goto(9));" If the first feature or attribute in question 7 is rated less than 4 on a scale of 1 to 5, continue to question 8; otherwise, skip to question 9. In the example below there are a total of five features.

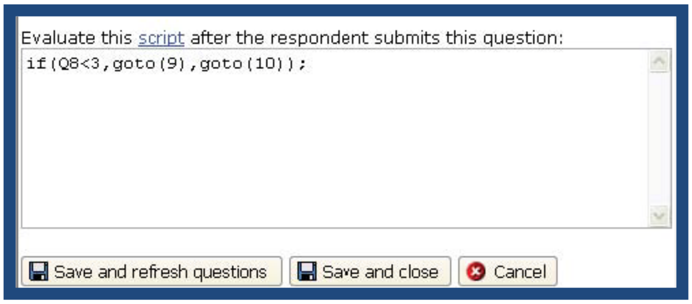


Depending on the objective, it may be easier to use the **Selectively Present** feature for multiple features/attributes.

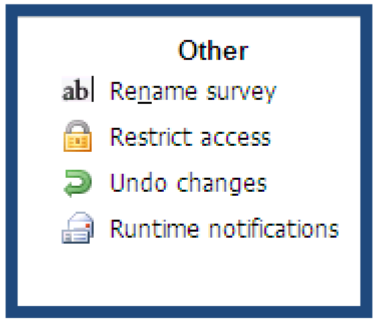
There may be instances where you want to skip respondents based upon numeric answers provided. When using the numeric question type, you can write scripts using symbols representing less than, greater than or equal to. You will find some of these symbols under ***General Scripting Help*** *and* ***Logic*** after the example below.

For example:

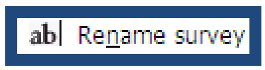
- "if(Q8<3,goto(9),goto(10));" That is, if a respondent states less than 3 in question 8, go to question 9; otherwise proceed to question 10.



d. Other

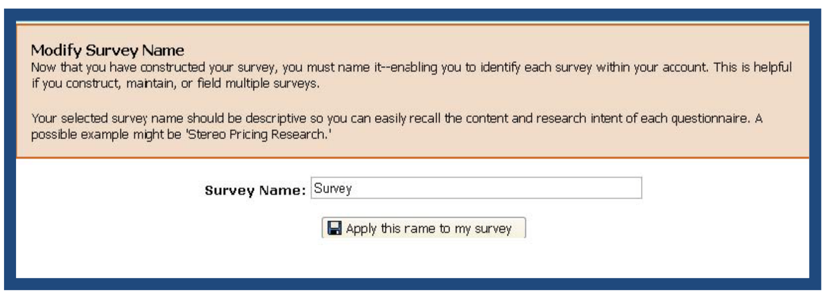


i. Rename Survey

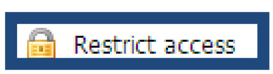


To change the name of your survey, click on the **Rename survey** link in the **Survey Controls**. A box will appear on the screen. Enter your new survey name in the box and click on the **Apply this name to my survey** button.

**Please note: the default survey name for new surveys is "New Survey."*



ii. Restrict Access

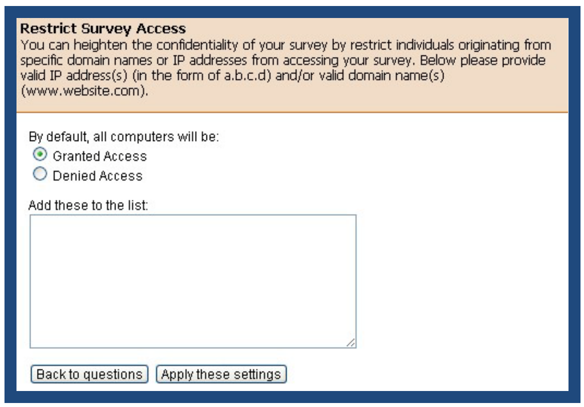


Some clients may choose to restrict access to their surveys. You have the ability to prevent individuals who originate from specific domain names or IP addresses from accessing your survey. To use this feature, click on the **Restrict access** link. A new page will then open, giving you the option to grant or restrict access to certain IP addresses or domain names.

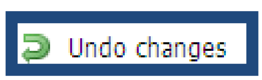
On this page, you will have the following two options:

- By default, all computers will be **Granted Access:** This option grants survey access to all domain names and IP addresses. Only those added within the field provided will be denied access to your survey.
- By default, all computers will be **Denied Access:** This option denies survey access to all domain names and IP addresses. Only those added within the field provided will be able to access your survey.

****Please Note:** Any user denied access to your survey will see a message of "Access Denied".*



Domain names should be entered in the format of: "www.site.com" and IP addresses should be entered in the format of "a.b.c.d."

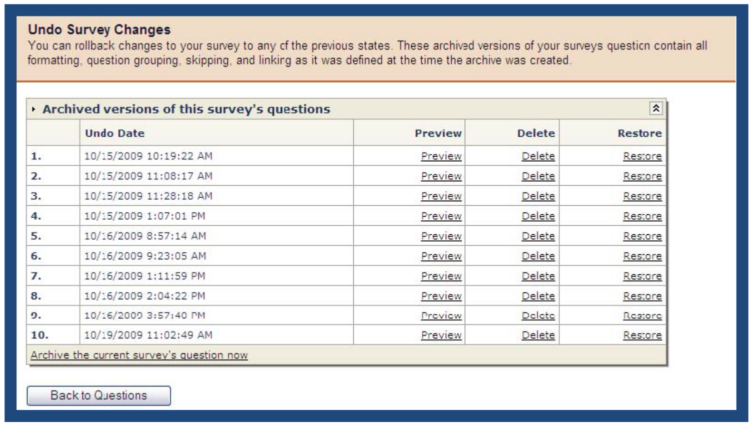
ii. Undo changes 

It is possible to rollback changes made to your survey, and return to any of its previous states. These archived versions of your survey questions contain all formatting, question grouping, skipping, and linking as they were defined at the time the archive was created. The editing session is archived when you leave the Sequence Questions page or log out of your account. Every time you go back into your account, you will see the previous session(s) archived.

For example, if you add a question to the middle of your survey and then later decided to remove it, you can use the **Undo changes** link to roll the survey back to the previous version. After clicking on the link, you are presented with the last ten archived versions of the study.

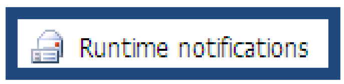
You can preview the version of your choice by clicking on the **Preview** link. Once you have previewed a version and decided it's the survey you would like to use, click on the **Restore** link.

You can also delete a version if necessary by clicking on the **Delete** link.



__Please note__: the system only saves the last 10 versions of your survey.

iii. Runtime Notifications



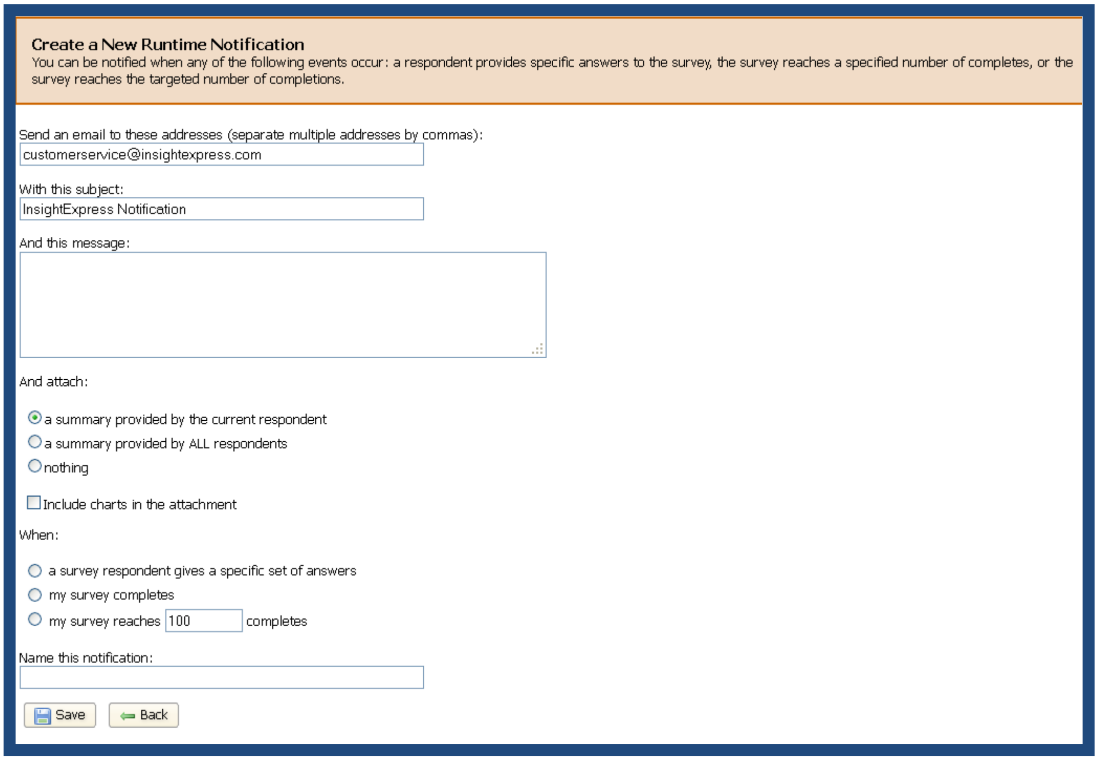
Runtime Notifications allows you to receive notifications when any of the following occur:

- Survey completes
- Survey reaches a certain number of completes
- Survey reaches a certain number of views
- A respondent provides certain answers

***Please note:** If you are interested in obtaining this feature you may contact your Account Representative or InsightExpress Support for assistance.*

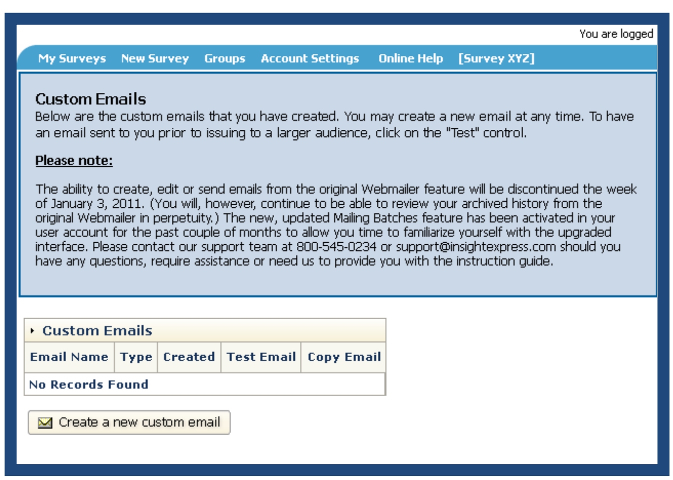
There are two types of runtime notifications; **Client Notifications** and **Respondent Notifications**.

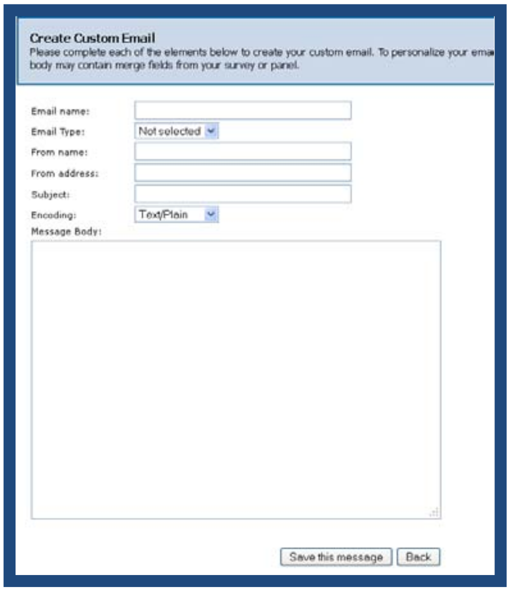
Client Notifications: Allows you to send a notification to your email address, or to the addresses of your colleagues. This notification also allows you to choose a personal message to be sent within the email and also attach survey results charts for each question that was answered.



Respondent Notifications: Allows you to establish a notification to be sent to a respondent. In order to set up a respondent notification, you must ask a respondent to include their email address somewhere within the survey. To do this, insert a short text box question into your survey and under question options, check of “Email format”.

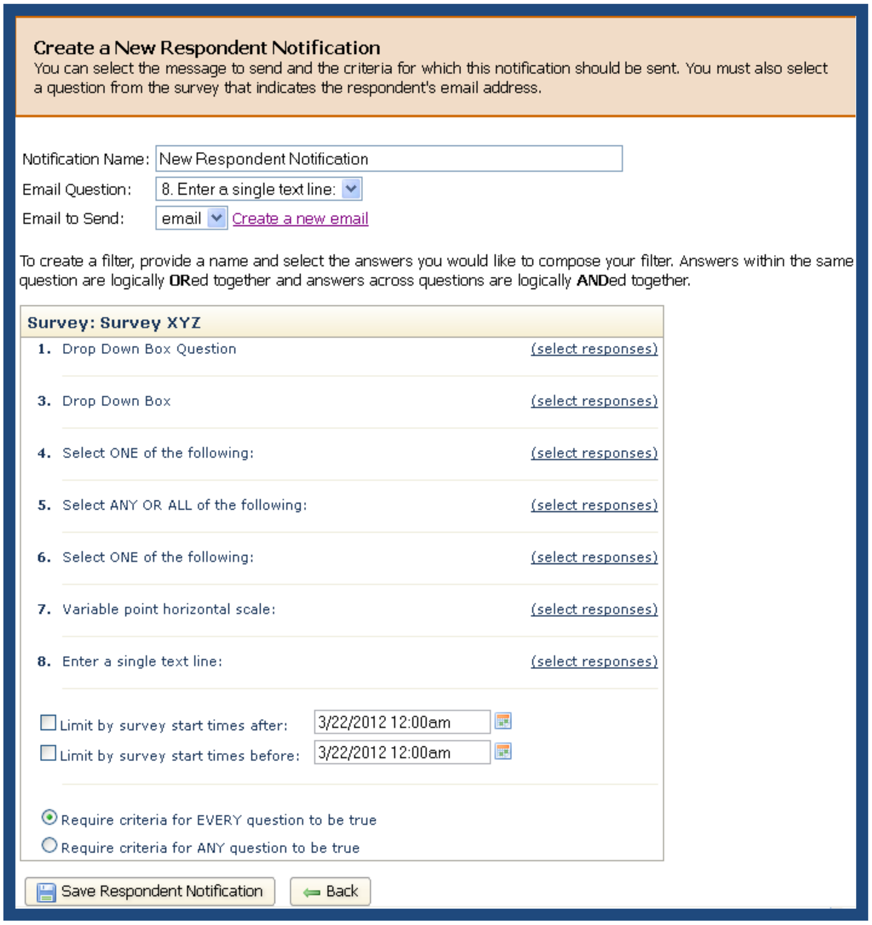
Upon inserting an email type question, you can then choose a “Respondent Notification” and then click “create a custom email message”.





Next, you will need to customize the email that will be sent. You may designate the senders name, e-mail address, subject, and customize the personal message being sent to respondents. This can be used as a way to thank respondents for participating in a survey or as a follow up email.

Upon saving custom email, go back to the editing screen of the survey and once again choose "Respondent Notification" under "Runtime Notifications". You will now be able to filter who you will send a Respondent Notification to, based on how a question was answered. If you would like each respondent who completes a survey to receive a Respondent Notification email, click "select responses" next to the last question in the list and choose "Any" or "Is Answered" before saving the notification.


Create a New Respondent Notification
You can select the message to send and the criteria for which this notification should be sent. You must also select a question from the survey that indicates the respondent's email address.
Notification Name:
New Respondent Notification
Email Question:
8. Enter a single text line:
Email to Send:
email
Create a new email
To create a filter, provide a name and select the answers you would like to compose your filter. Answers within the same question are logically ORed together and answers across questions are logically ANDed together.
Survey: Survey XYZ
1. Drop Down Box Question
(select responses)
3. Drop Down Box
(select responses)
4. Select ONE of the following:
(select responses)
5. Select ANY OR ALL of the following:
(select responses)
6. Select ONE of the following:
(select responses)
7. Variable point horizontal scale:
(select responses)
8. Enter a single text line:
(select responses)
Limit by survey start times after:
3/22/2012 12:00am
Limit by survey start times before:
3/22/2012 12:00am
Require criteria for EVERY question to be true
Require criteria for ANY question to be true
Save Respondent Notification
Back

7. SURVEY DATA PRE-POPULATION

Data pre-population is used when you already know information about your respondents, and would like to record this information without asking respondents to provide it. Questions with pre-populated answers are hidden from respondents, but will be seen when looking at your survey data.

***PLEASE NOTE:** *TO ENSURE PROPER DATA COLLECTION, PRE-POPULATED QUESTIONS MUST BE INSERTED AT THE BEGINNING OF YOUR SURVEY.*

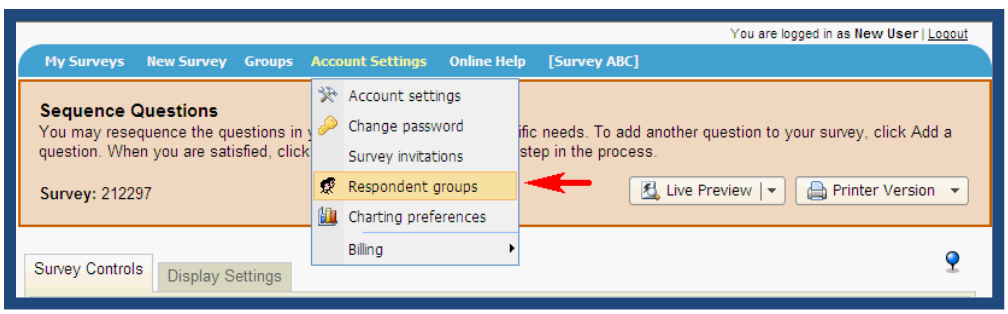
Only single select questions, multi-select questions and open-ended questions may be pre-populated. Information that you may pre-populate may include:

- Account Number
- Employee ID number
- Name
- Department
- Region
- Age

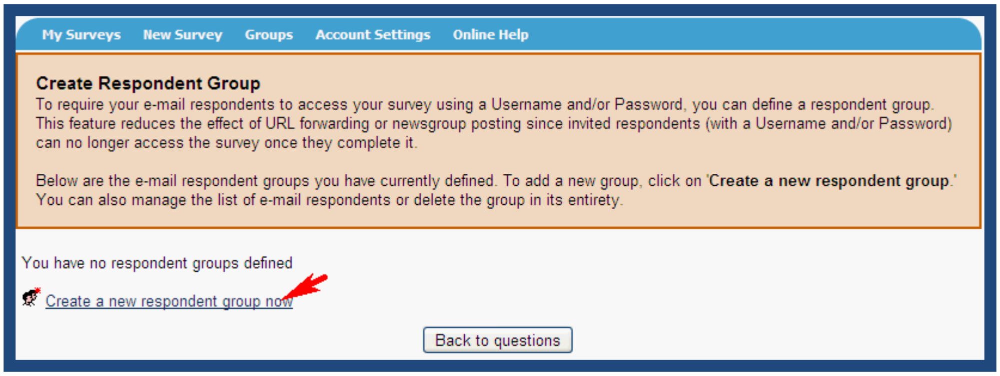
a. Step One: Creating a Respondent Group

A respondent group is a pre-defined respondent list with a unique username and password assigned to each respondent who you would like to have access to your survey.

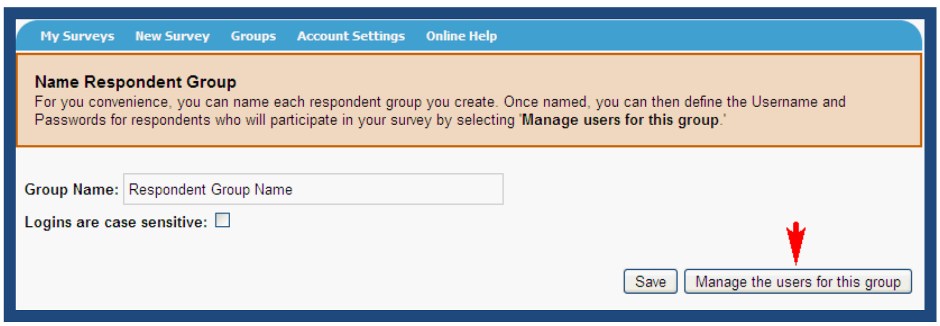
To create a respondent group, go to the **Account Settings** tab in your account and click on **Respondent Groups**. Next, click on **Create a new respondent group now**.



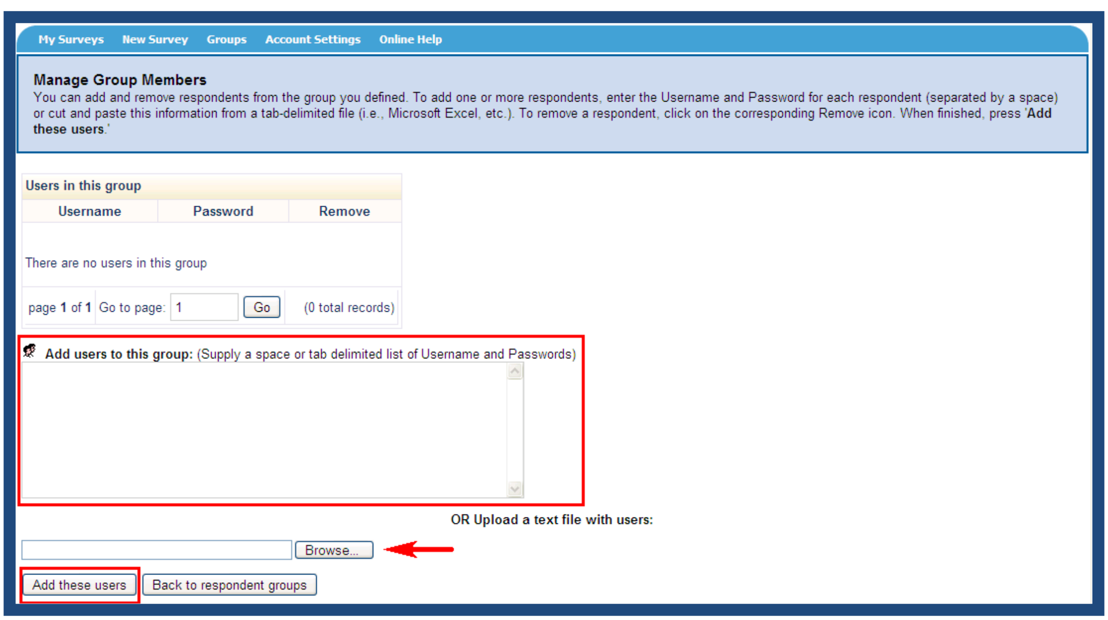
This will bring you to the first step in creating a respondent group—to type your group name in the text box provided (as shown below).



After naming your respondent group, click on **Manage the users for this group** which will allow you to set usernames and passwords for each individual respondent.

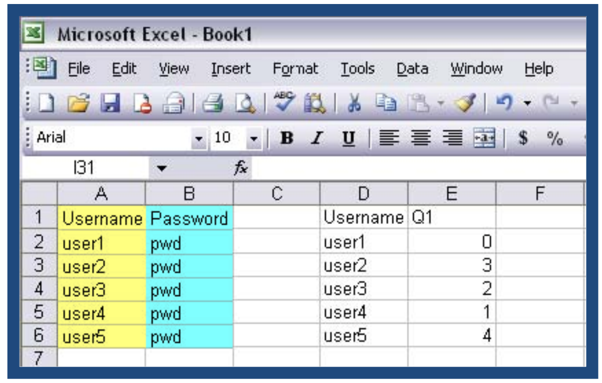


Then, copy and paste your respondent usernames and passwords from an Excel file into the box provided at the bottom of the following page. You may also upload this information in a text file. (This is the same process that you use to pre-populate answers.)



You can choose to manually insert each respondent into the field, or you can upload an excel file which will automatically populate the list of respondents into the system.

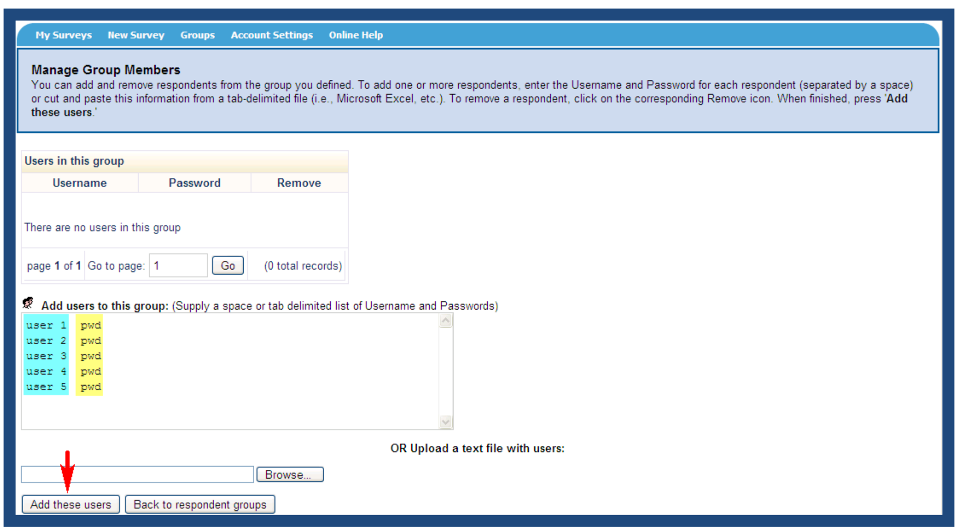
Here is a quick screenshot of a sample **Excel file** from which you might copy and paste usernames and passwords:



When creating the respondent group, you need to make sure that the username is unique for each respondent, which can be seen in Column A.

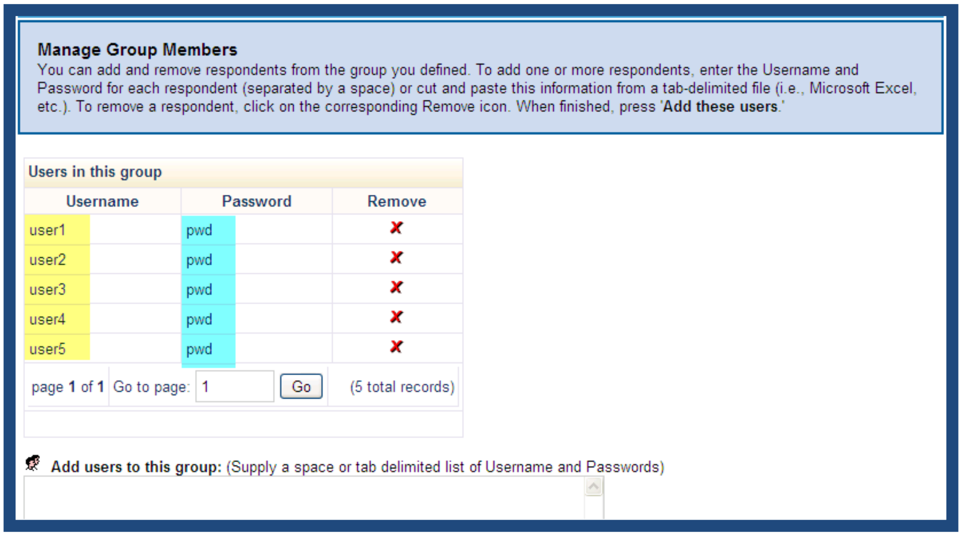
The password in Column B is the same for all respondents in this example, but can also be unique for all respondents. The username that you choose for building the respondent group is the username that you use when pre-populating questions. It can be seen in Columns A and D. The username will be used to "link" the respondent to the pre-populated answers (as seen in column E).

In the example below, columns A and B were copied into the **Add users to this group** box.



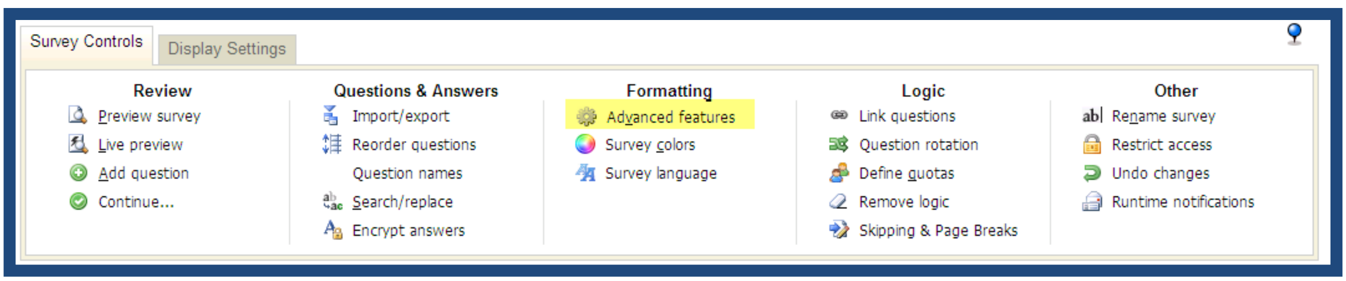
***Please note**: When creating a respondent group, InsightExpress recommends creating one or more test usernames for survey preview/testing purposes.*

Next, click on **Add these users** and the respondents you just added will appear within the **Users in this group** field at the top of this page. Once added, you may also remove a respondent if the information was uploaded incorrectly.

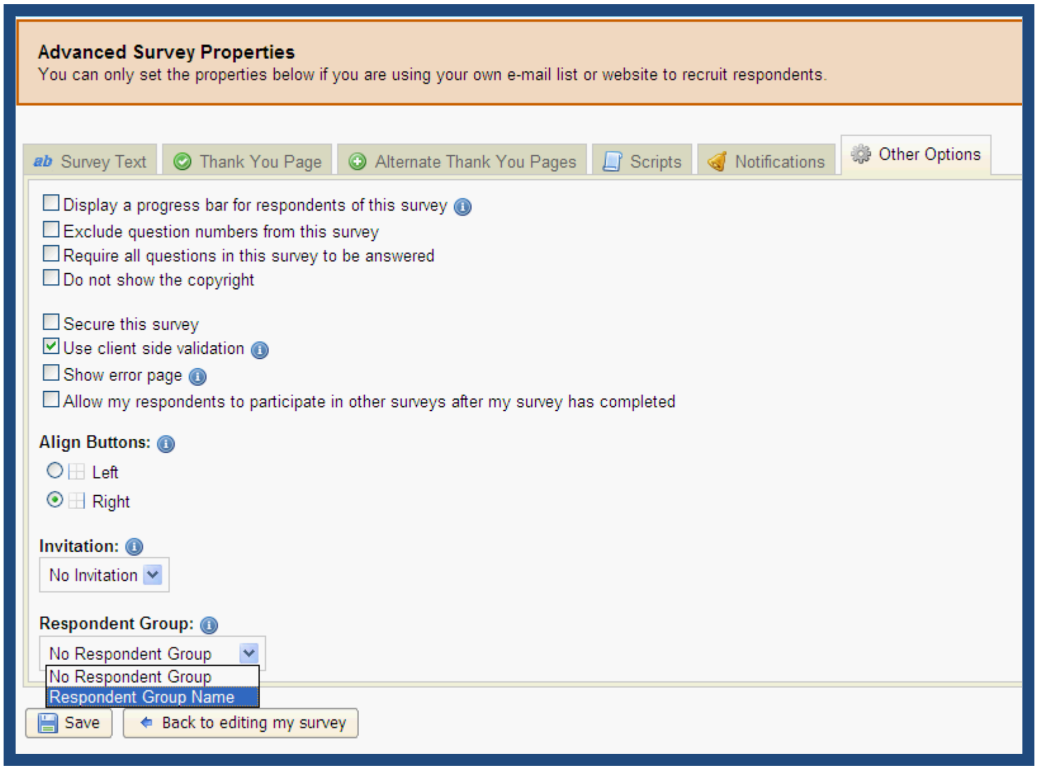


b. Step Two: Associating a Respondent Group

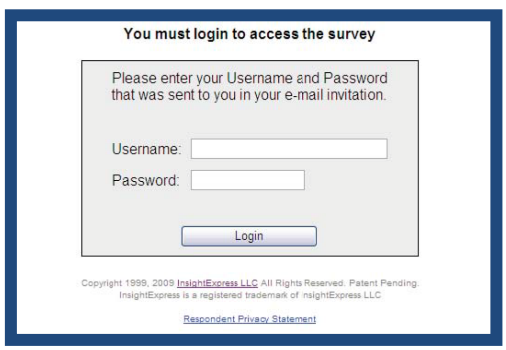
To associate a respondent group to a survey you must first return to your main **Sequence Questions** page. Next, open the **Advanced Features** menu located within **Survey Controls.**



From the **Advanced features** menu, navigate to the **Other Options** tab where you can then select your respondent group by name.



Finally, click **Save.** Now, when you go to **preview your survey,** you will be prompted with a new screen, asking for a username and password. This screen will be shown to anyone who attempts to complete your survey. However, only those respondents granted access to a username and password will be allowed to bypass this screen and continue to the actual survey.



****Please note**: Respondents will only be able to log in with a username and password that you uploaded via **respondent groups**. If they do not have a valid username, or if the username was already used, they will not be able to enter the survey.*

c. Step Three: Pre-populate Respondent Answers

****Please note:** The use of a respondent group is necessary for this feature. A respondent group associates a unique username (and password) combination to each respondent to trigger the*

data population within survey results. To learn about creating respondent groups, please refer to page ***89***.

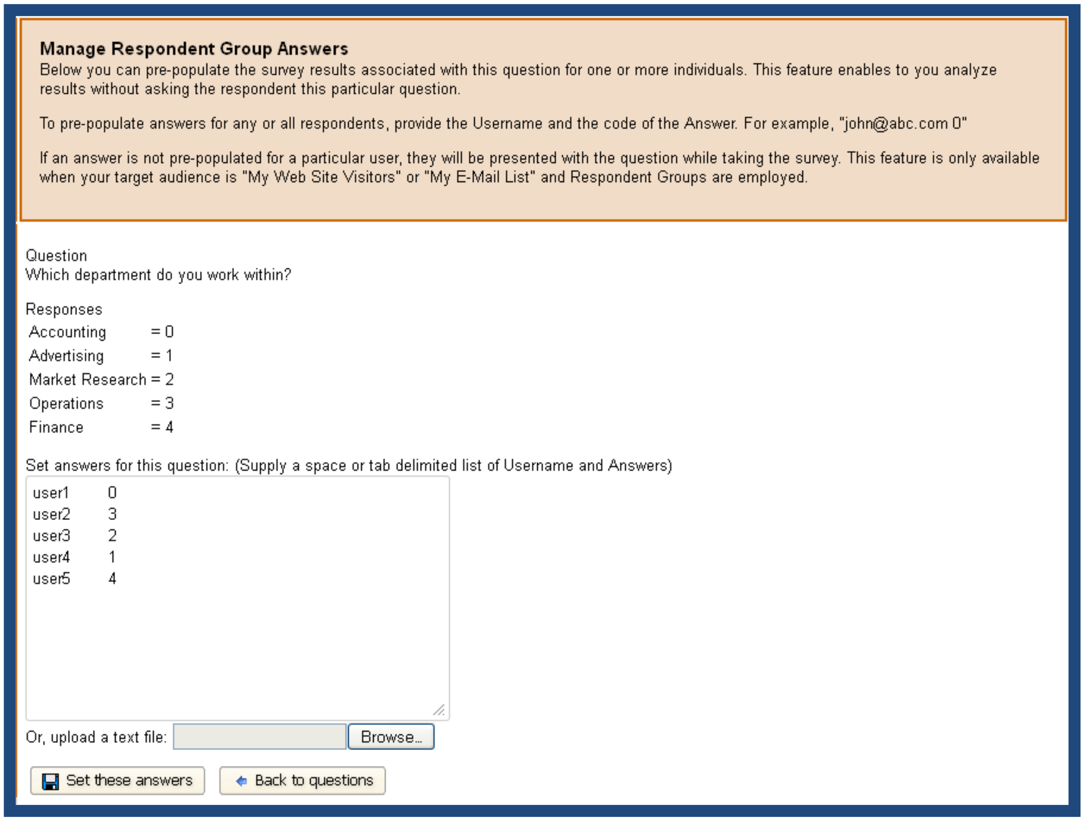
After you have associated a respondent group to your survey, first determine which questions you will be pre-populating based on that respondent group (for more information on respondent groups, please refer to page **89**). In the following example, respondents are asked to indicate which department they work within.

If you have this information available to you, and would like to record it within your survey **without** explicitly asking respondents to provide it, you may choose to have this question **pre-populated.**

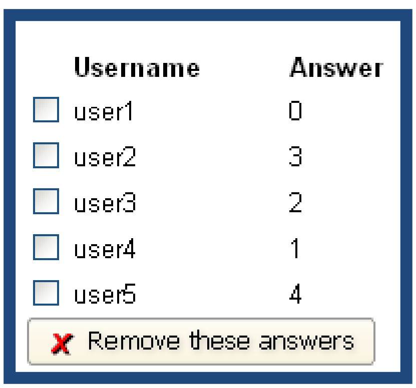
First, click on a question that will be pre-populated and select **Edit**. Scroll down to the bottom of the page and select **Prepopulate answers.**

When you select a question, the codes for each answer choice will be provided (see screenshot below).

Once you have created an Excel file, setting one answer for each pre-populated respondent (as shown on page **91**), you may copy and paste this information into the box located at the bottom of the **Manage Respondent Group Answers** page. The below screenshot shows you the username and pre-populated response in a tab delimited format (where the tab acts as the space between the username and response.) You may also upload this information as a comma or tab-delimited .txt file.



To save this information, select “Set these answers”. Your respondent usernames and corresponding responses will then be displayed on the page as shown below. To remove respondents’ answers from this list, you may select one or multiple rows before clicking “Remove these answers”.

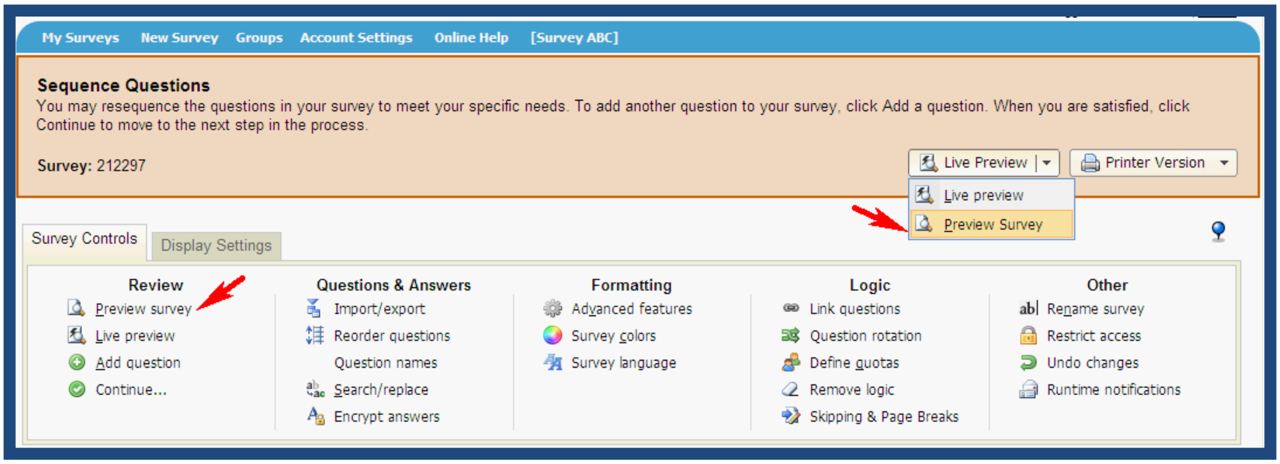


Pre-populated questions will not appear to the respondent, but the answers that you have established will be included within the data set.

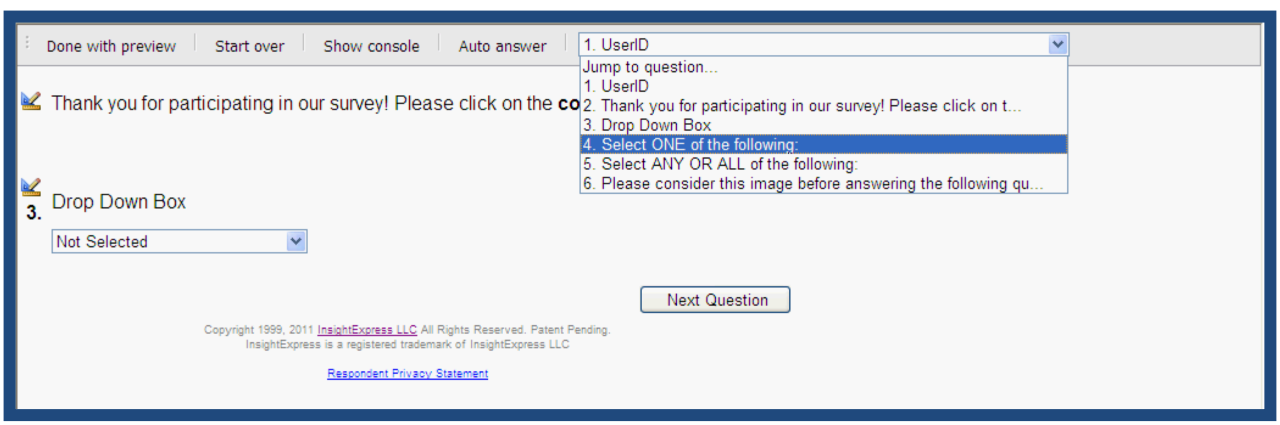
***Please note:** Pre-population of answers for respondent lists over 8,000 must be managed by InsightExpress. Please advise your Account Representative*

8. PREVIEW SURVEY

a. Preview Survey



While working on your survey, **Preview Survey** allows you to test your survey, overriding many run-time enforced rules (e.g., use of the browser "Back" button, etc). This feature allows you to view any specific question *after viewing the first page* by highlighting the **Jump to Question** option and then clicking on the appropriate question. Also, at any time, you may preview your survey from the beginning by clicking **Start Over.**



**Please note: if the question that you are trying to jump to is selectively presented off of a previous question, you must still answer the qualifying question before you can jump.*

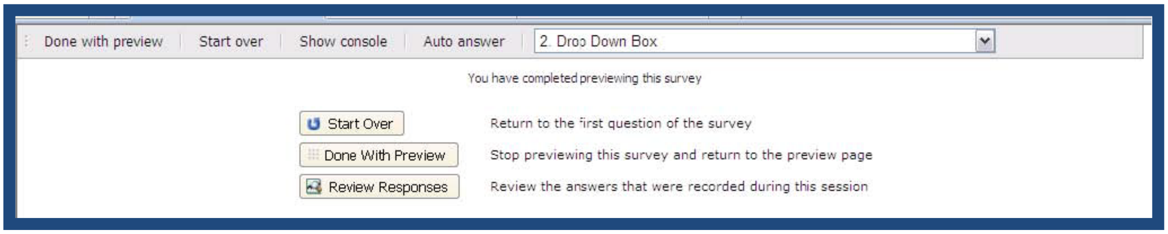
If you notice a text error or if you notice something about a question that you would like to change while previewing, you can simply click on the "Edit" icon above the question number. This will open up the editing page of the question. Once you have made any edits, you can "Save and resume" to be brought back to the section of the **Preview** you last left off at:

Several options are available with Preview Survey:

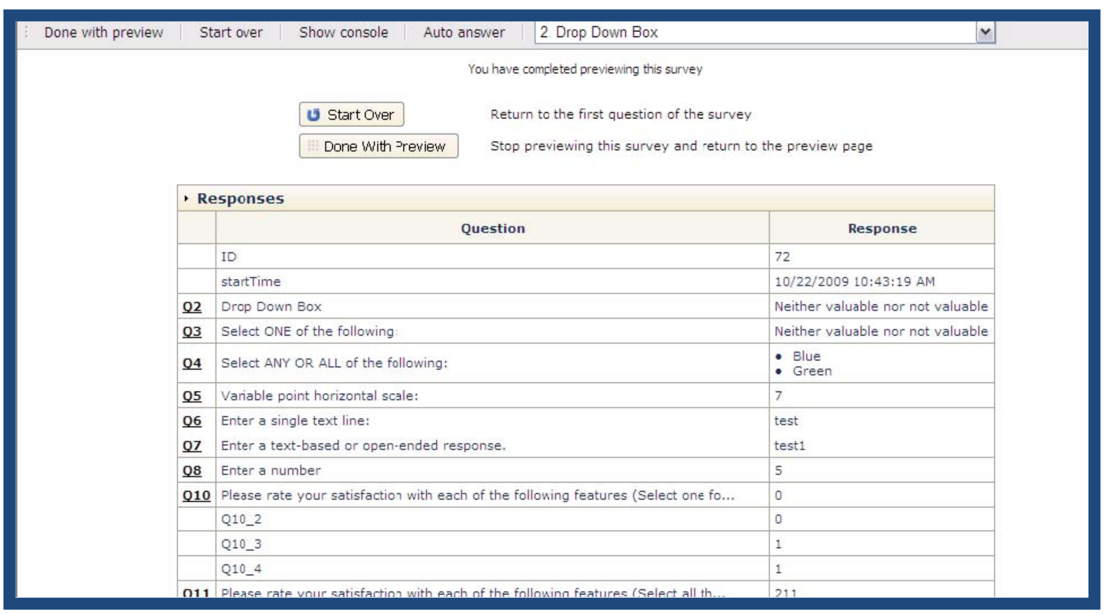
Done with preview: Allows you to return to the **Sequence Questions** page.
Start over: Allows you to start the preview from the first question.
Show console: Allows you to monitor the logic in your survey to uncover and diagnose problems.
Auto answer: Automatically chooses answer choices.
Jump to question: Allows you to skip to a question in the survey without answering all prior questions after the first page of questions. .

****Please Note:** Because the **Preview Survey** feature allows skipping between questions, it will not allow you to view a Thank You Message upon hitting "submit". Instead, you will be brought to a page that states "You have completed previewing this survey." If you would like to test*

Thank You Page scripting and functionality, please use the ***Live Preview*** *feature. Instead, the following page will be shown:*

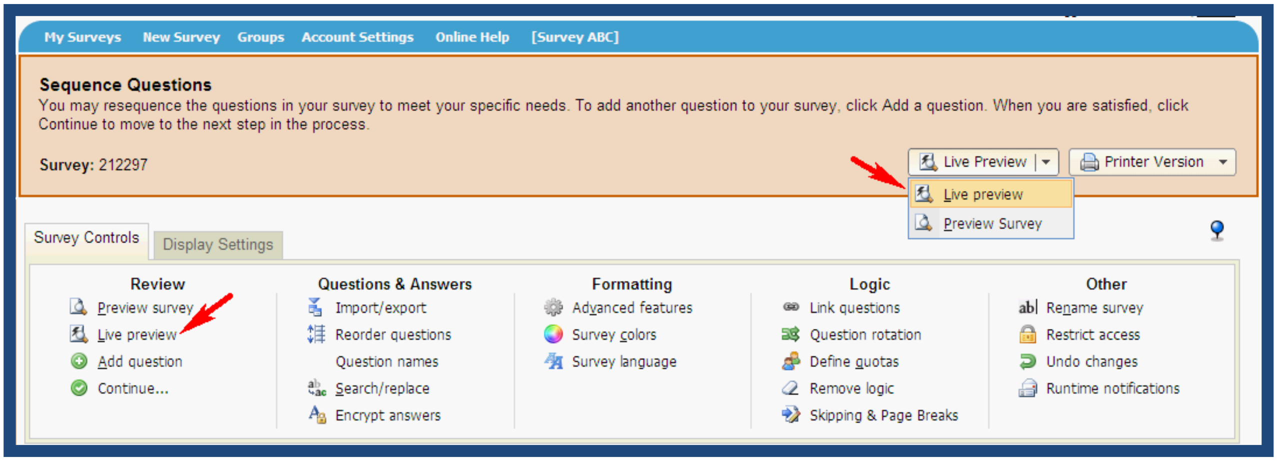


Review Responses: Upon completion of a survey in preview mode, this option will show the answers that were recorded during the preview. These answers will not be counted towards the live survey results.



	Question	Response
	ID	72
	startTime	10/22/2009 10:43:19 AM
Q2	Drop Down Box	Neither valuable nor not valuable
Q3	Select ONE of the following	Neither valuable nor not valuable
Q4	Select ANY OR ALL of the following:	• Blue • Green
Q5	Variable point horizontal scale:	7
Q6	Enter a single text line:	test
Q7	Enter a text-based or open-ended response.	test1
Q8	Enter a number	5
Q10	Please rate your satisfaction with each of the following features (Select one fo...	0
	Q10_2	0
	Q10_3	1
	Q10_4	1
Q11	Please rate your satisfaction with each of the following features (Select all th...	211

b. Live Preview



Live Preview allows you to view your survey in advance exactly as it will appear to respondents. This feature allows you to test the survey questions, answers, Thank You page, and see exactly how it will look once your survey has been launched.

Choosing **Live Preview** opens a new window with a unique URL. This feature is helpful if you would like to share your survey with someone who does not have an InsightExpress account. To do so, just copy the URL and paste it into an email.

****Please note:*** *The live preview URL does **not** capture respondent data. It is simply used to test the survey before it is sent live.*

If there is skip logic within your survey, the question numbers may appear out of sequence as survey skipping is based off actual question placement. The question numbers will re-adjust themselves once the survey is live. **Custom HTML** questions will not be numbered once a survey goes live, but will be numbered in the Live Preview for editing and testing purposes.

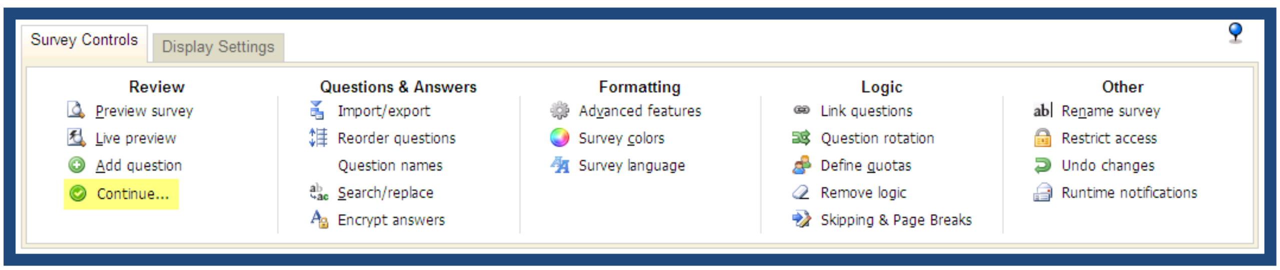
9. SURVEY LAUNCH

a. Submitting Your Survey to Launch

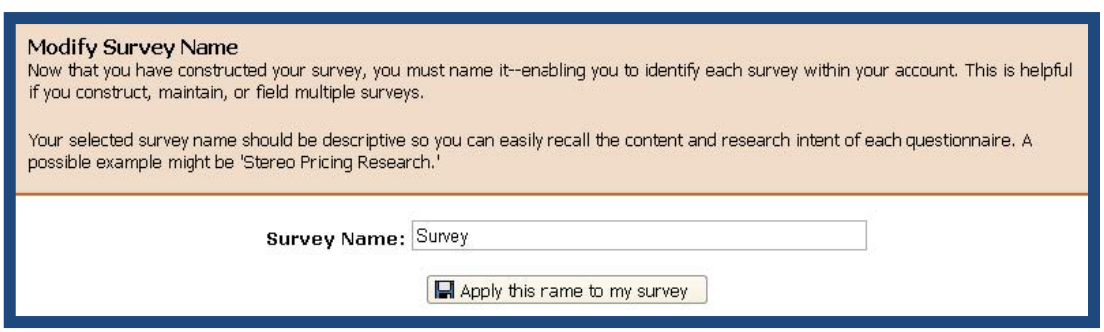
***Please note:** After launch, minimal editing options are available. Once a survey has gone live, you may edit your survey's Thank You Page, Not Running Page, and the Web Site Intercept/Invitation Delivery settings. However, if simple text edits are needed to be made to a question within the survey, please contact InsightExpress Support for assistance.*

There are a number of steps that must be followed in order to prepare your survey for processing.

Once you have finished building your survey, you may begin the approval process by clicking on the **Continue** located within the Review column of the Survey Controls box.

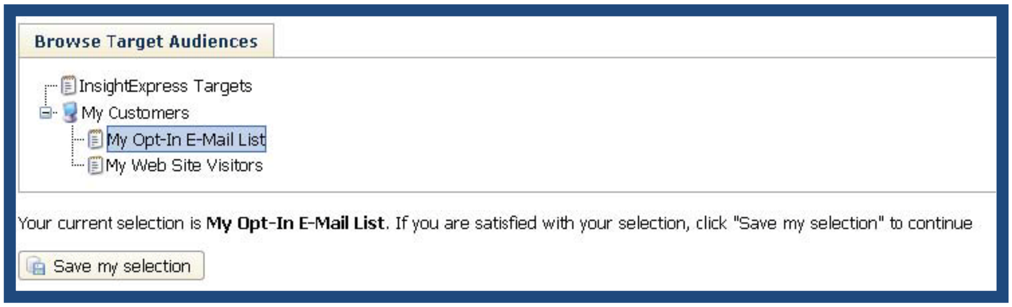


b. Confirm Your Survey Name



The first page that you will see will ask you to confirm your survey's name. To do so, type in your desired name and click **Apply this name to my survey.** However, if you have already named your survey simply confirm the name you have selected and click **Apply this name to my survey**.

c. Selecting the Target Audience



Once the name of the survey has been applied, you will be brought to the **Target Audience** screen. Here you can choose from **My Opt-In Email List** or **My Web Site Visitors**, depending on to whom your survey will be sent.

<u>My Opt-In Email List:</u>
Select **My Opt-In Email List** if you would like to distribute your survey link to respondents from your own e-mail account. Upon processing your survey, InsightExpress will provide you with a link to your survey's live URL. You may then distribute this link to an opt-in respondent list using your preferred communication method (such as Microsoft Outlook).

****Please Note:*** *InsightExpress clients may also employ our* ***Mailing Batches*** *feature to distribute the survey link to respondents. Please contact your Account Representative for more information on Mailing Batches, including a tutorial and additional support materials that provide specific instruction.*

<u>My Website Visitors:</u>
With this target, you will receive an automated email containing your survey's live URL once your survey has been processed. Within this email, you will also receive a JavaScript tag, which you may then embed this within a webpage.

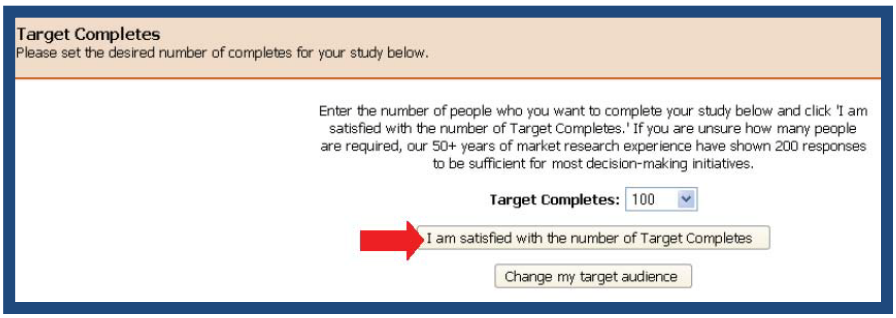
Once your survey's audience is selected, click the **Save my selection** button at the bottom of the screen.

****Please note:*** *External sample options, delivered by InsightExpress via e-RDD or our many longstanding partnerships with sample providers, are not available through these launch methods. If you are interested in fielding a survey to an InsightExpress audience, please contact your Account Representative or an InsightExpress PM&O Coordinator for more information.*

d. Designating Target Completes

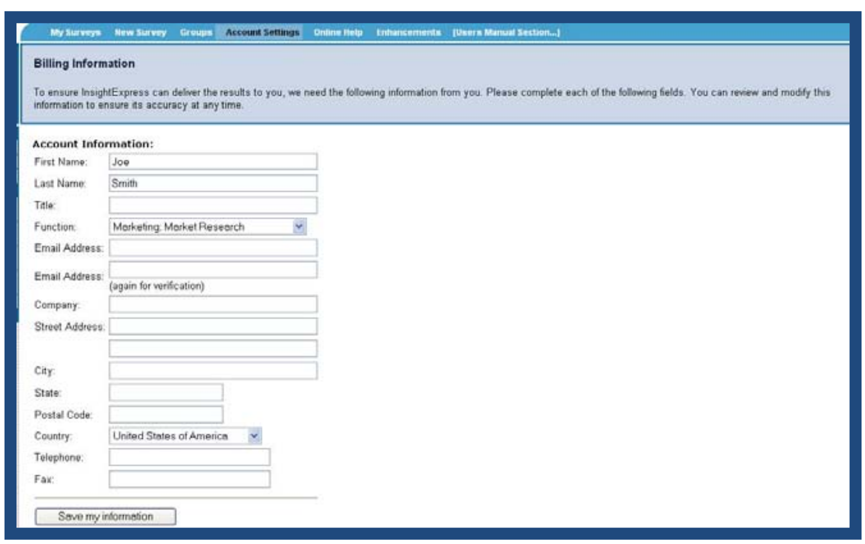
After selecting a target audience, you will be brought to the **Target Completes** page. Here you will determine how many completed surveys your survey will collect before automatically closing.

Once the target number of completes is entered, click on **I am satisfied with the number of Target Completes**. If you would like to go back and change the target audience, click on **Change my target audience**.

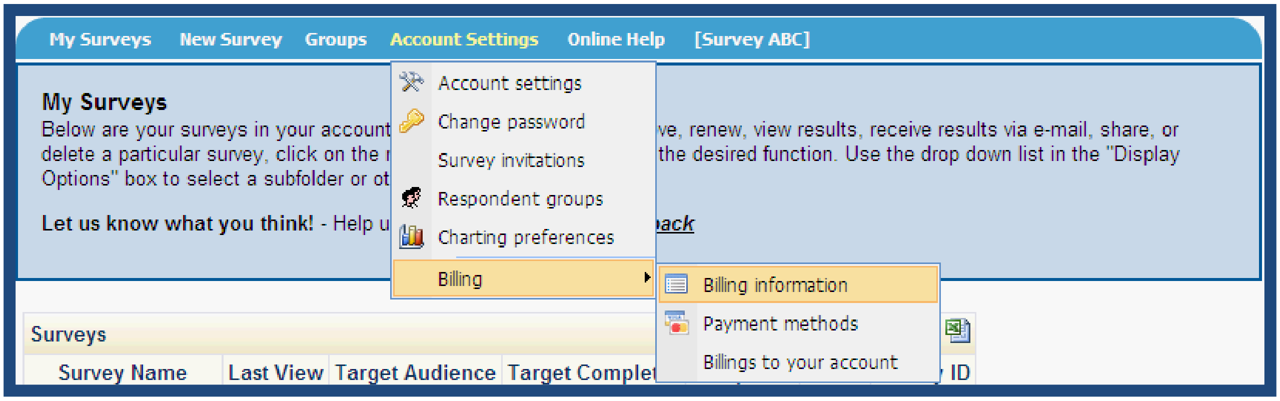


e. Finalize Your Billing Information

If your billing information is not yet complete upon launching your survey, the **Billing Information** page will appear. Complete the fields presented and click the **Save my information** button at the bottom of the screen to continue.

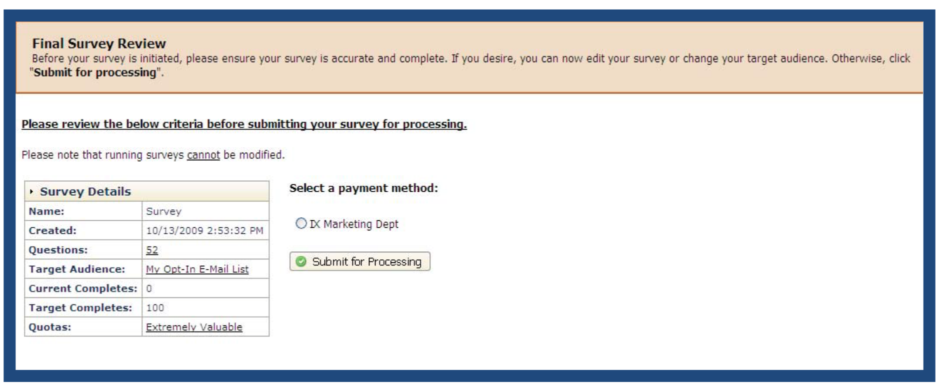


You can also set up your billing information at any time by going into **Account Settings→ Billing→ Billing information.**



f. Final Survey Review

After accepting the price, you will be directed to the **Final Survey Review** page. Here, you must select a valid payment method before submitting the survey to InsightExpress for approval. Depending upon your company's Client-Respondent (CR) Pack, your survey will either be automatically proceed (made live) or will be sent to the InsightExpress PM&O Coordinators for a final review.

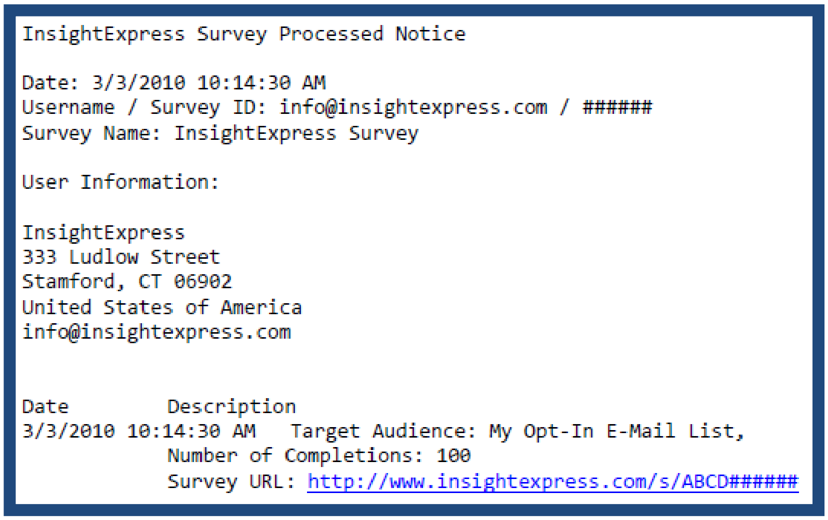


*__*Please note:__ An error message will be displayed if you do not have a valid payment method set up within your account. Please contact your Account Executive if you would like to be added to your company's payment method or if you would like one set up for you.*

g. Activate/Distribute Survey

Once your survey has been processed, you will receive an email containing your survey's live survey URL or JavaScript tag. Automated processing emails should be received within the hour upon submitting for processing. However, please allow up to an additional four hours processing time for surveys that have been directed towards the InsightExpress PM&O Coordinator Team for review

An example email is shown below:



InsightExpress Survey Processed Notice

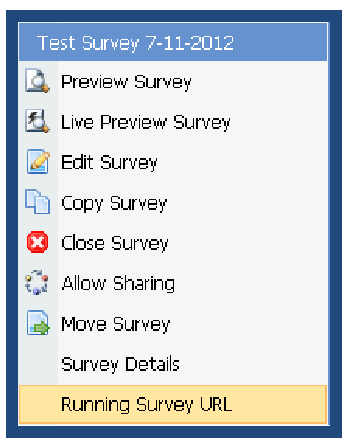
Date: 3/3/2010 10:14:30 AM
Username / Survey ID: info@insightexpress.com / ######
Survey Name: InsightExpress Survey

User Information:

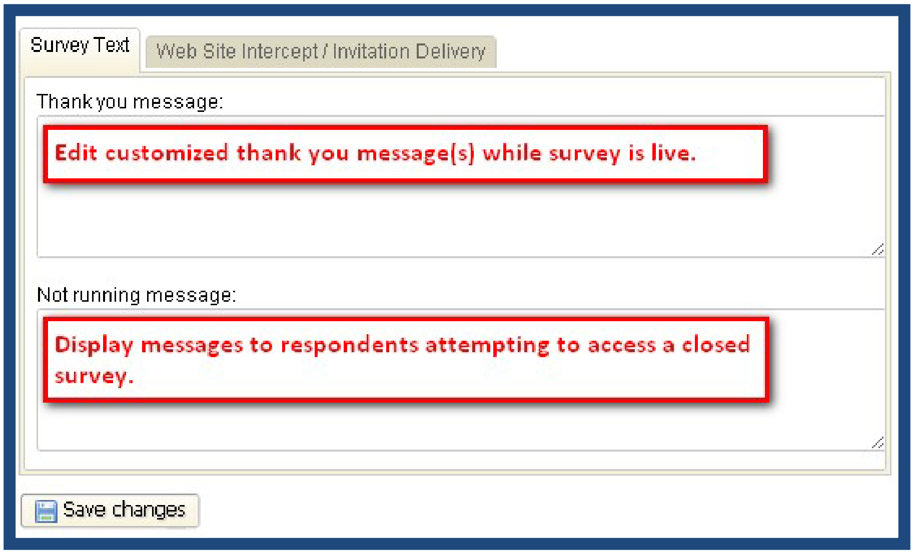
InsightExpress
333 Ludlow Street
Stamford, CT 06902
United States of America
info@insightexpress.com

Date Description
3/3/2010 10:14:30 AM Target Audience: My Opt-In E-Mail List,
Number of Completions: 100
Survey URL: http://www.insightexpress.com/s/ABCD######

You may also retrieve your live survey URL after launch by selecting your survey and choosing "Running Survey URL"



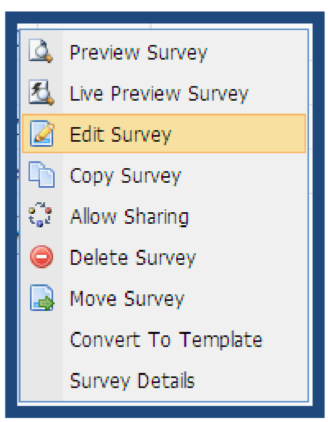
Once a survey has been made life, only the Thank You Message, Not Running Message, and Web Site Intercept/Invitation Delivery settings may be edited.



Prior to sending the email to respondents, you may need to delete your browser cookies and cache to ensure that you are not sending a link that is "cookied", bringing respondents directly to the Thank You Page.

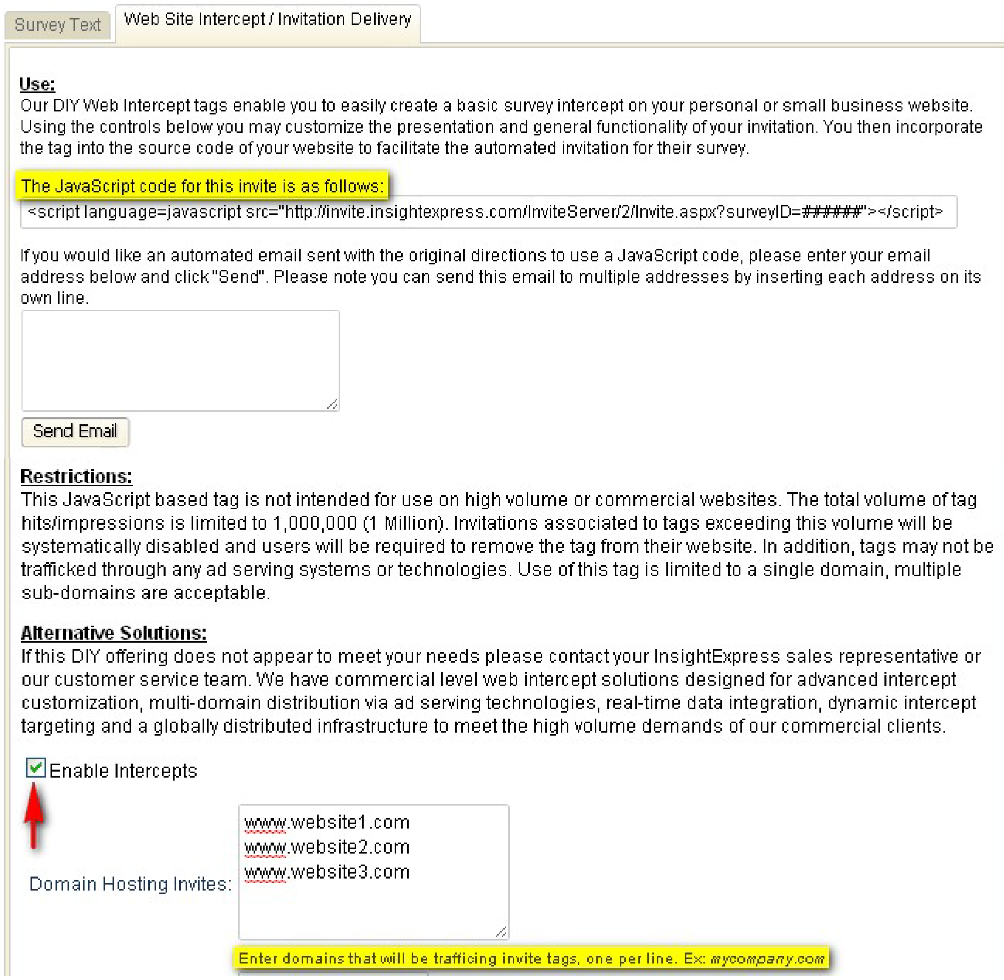
If you are sending your survey via email, simply place the live URL into the body of your email text. Please make sure to test this link prior to sending it to your email list. Also, you may need to delete your browser cookies and cache to ensure that you are not sending a link with interfering cookies. Otherwise, respondents may be brought directly to the end of your survey rather than the beginning. After distributing your live URL, you may also view your results in real time to ensure that all your data is collecting properly.

If you are placing the survey on your website, you may use our DIY intercept Delivery Options. Once your survey is live, you can access this area by clicking on the survey name and going to "Edit Survey."



You will be brought to the Survey Details page that will allow you to modify the Web Site

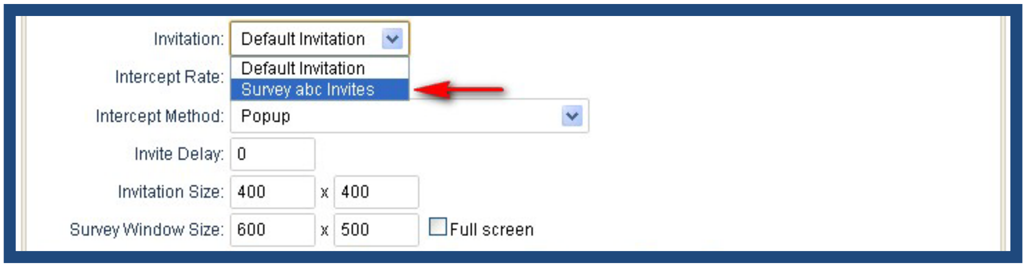
Intercept / Invitation Delivery section.



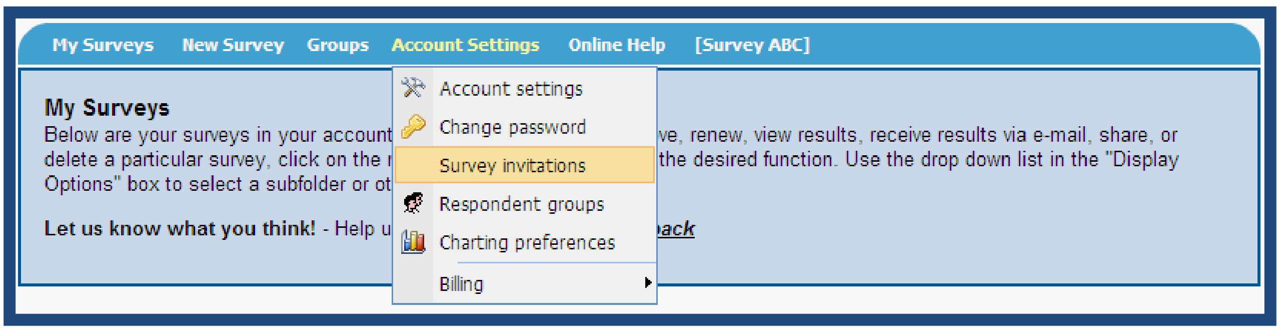
This feature allows survey owners to append a JavaScript code to their website, which would then populate a survey invite to respondents who visit this web page. This tag is only accessible from within this feature. From here, you also have the option of sending instructions regarding how to append this tag to multiple individuals. To do so, input multiple email addresses within the field provided.

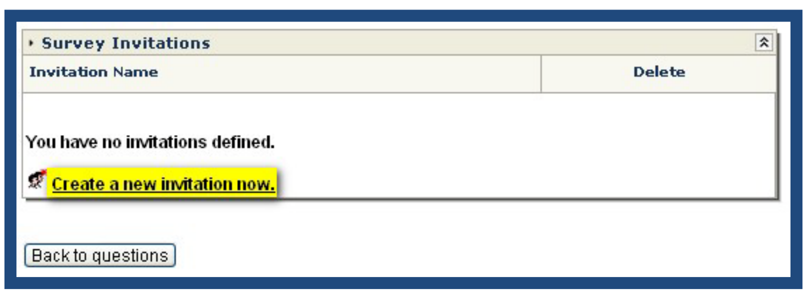
To ensure that web intercepts operate correctly, select “Enable Intercepts”. This checkbox is available within the Alternative Solutions section. If you would like these invites to appear on more than one website, you may input multiple website URLs within the Domain Hosting Invites field.

Following this step, you must select your survey invitation. You may do so by selecting the drop down box and choosing from the list of previously created invitations. If none appear, you must create one.

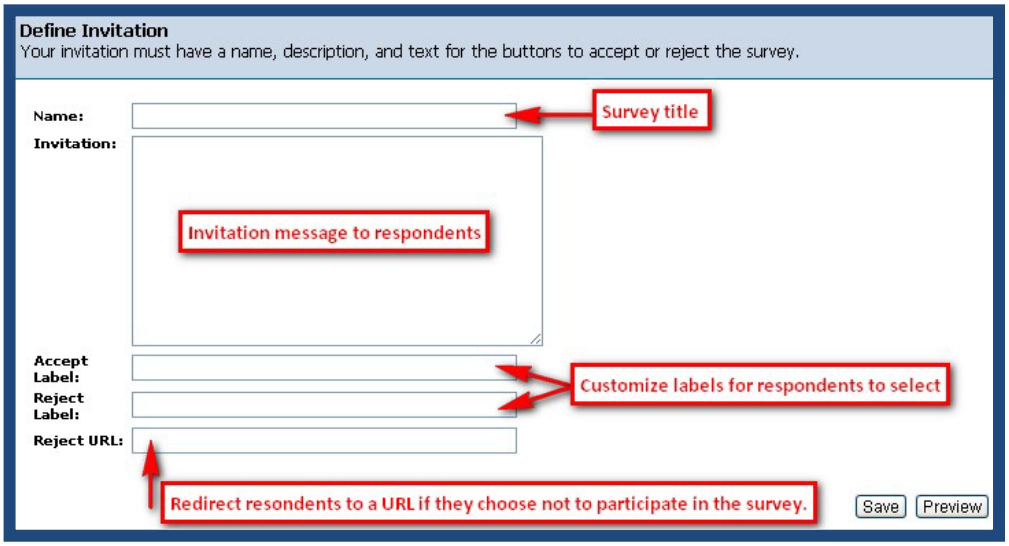


To create a new invitation, you will need to access the Account Settings tab and select Survey Invitations. The following page will list all of the survey invitations created within your account. To create one, select “create a new invitation now”.



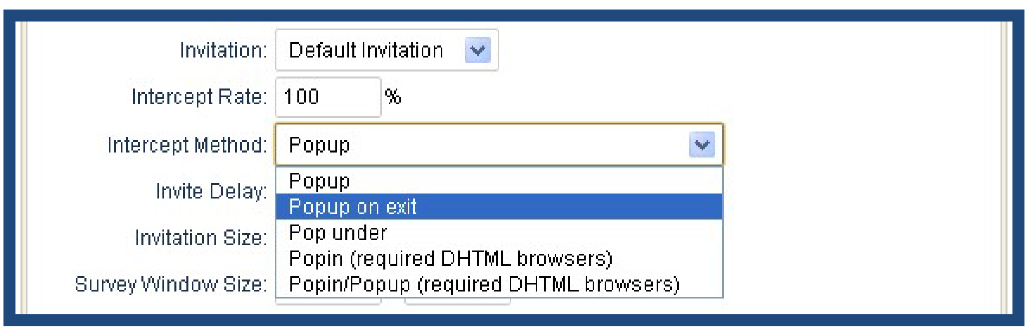


You must define your invitation as a last step. You will need to title your invitation and create a message to respondents that will invite them to this survey. You are also provided the option of customizing your invitation “accept” and “reject” labels, and may provide a redirect link for all respondents who reject the survey.

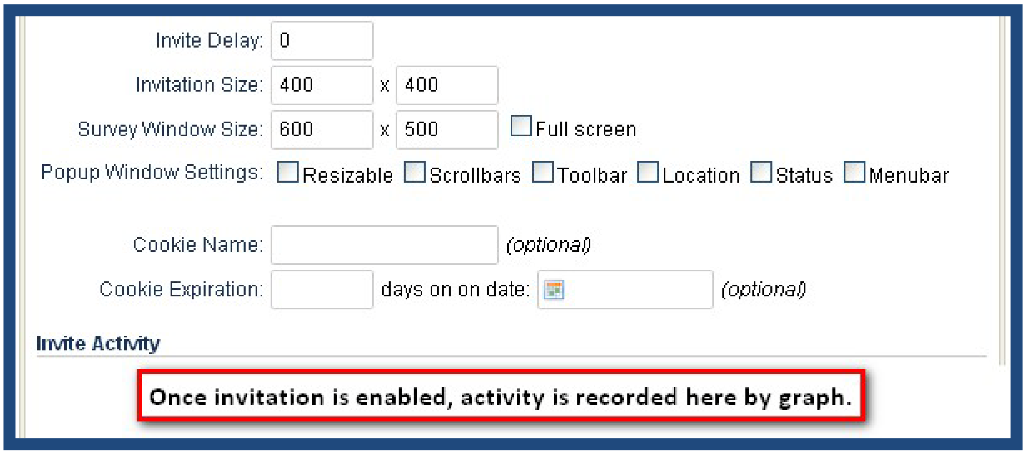


Once the invitation has been saved, you may return to the Web Site Intercept / Invitation Delivery page and select the recently made invitation.

Other options within this feature include indicating your invitation's intercept rate (how often the invitation will appear to respondents who visit one of the specified web pages). You can also choose how you would like the invite to appear on the page. The most frequently used settings include: popping up on the page, popping up when the respondent exits the page, or having the invite pop under the website's page.



Invitation and survey window sizes may also be customized. You may select how tall and wide both items will appear to respondents when intercepting pages. The Web Site Interception / Invitation Deliver feature also allows users to include settings within the invitation popup window, ie. making it resizable, including a scroll bar, tool bar, and/or a menu bar. However, we advise users to use these options with caution as invitations should be displayed as simple as possible. Often the respondent may grow confused by the invite when too many options are available.



Titling the invitation's 'cookie' is optional. However, providing a name for the invitation may help to idenitfy the invitation in your browser's cache data. Also, you may set the invitation's 'cookie' experation by indicating a closing date. By default, cookies expire 365 days from launch.

When the invitation is enabled and begins intercepting your specified websites, the activity is logged within the Invite Activity section of the Web Site Interception / Invitation Delivery page. Here you are able to view trends throughout the running invitation. Please be sure to save your settings to at the bottom of the page to set ensure that the invitation is set to running.

****Please note**: To automate the delivery of your survey to a large audience, you may also employ our **Mailing Batches** tool. If you choose to distribute your survey, via mailing batch invites, please contact your Account Executive or a PM&O Coordinator for more information, tutorials, and support.*

10. FREQUENTLY USED SCRIPTS AND OPERATORS

Operators:

=	Equality
<>	Non-equality
+	Mathematical addition
-	Mathematical subtraction
/	Mathematical division
^	Mathematical exponentiation
>	Mathematical greater than
<	Mathematical less than
>=	Mathematical greater than or equal to
<=	Mathematical less than or equal to

Scripting Language:

if	If then Else
goto	Jump to a specific question
random	Select a number from a defined set of numbers
set	Assign a variable a specific value
checked	Determine if an answer within a checkbox list was selected
unchecked	Determine if an answer within a checkbox list was not selected
or	Logical OR operator
and	Logical AND operator
not	Logical NOT operator
max	Mathematical maximum
min	Mathematical minimum
sin	Mathematical Sin function
cos	Mathematical Cosine function
abs	Absolute value
int	Mathematical truncation (at the decimal point)

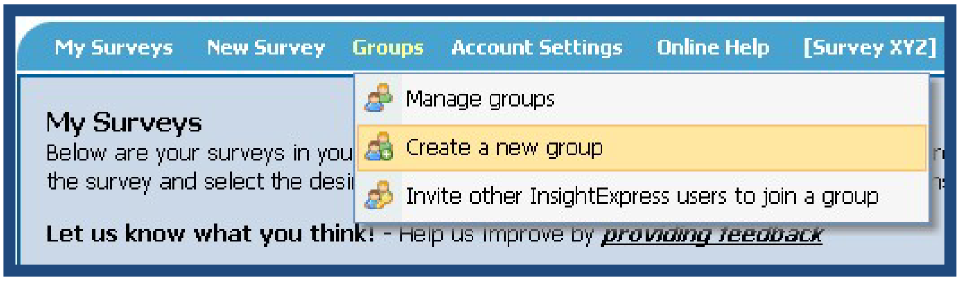
Response Tags:

<mutuallyexclusive>	Response will be mutually exclusive
<termpoint>	Response will become a termpoint
<specify>	Response will contain a specify box
<hidden>	Row or column will be hidden from view

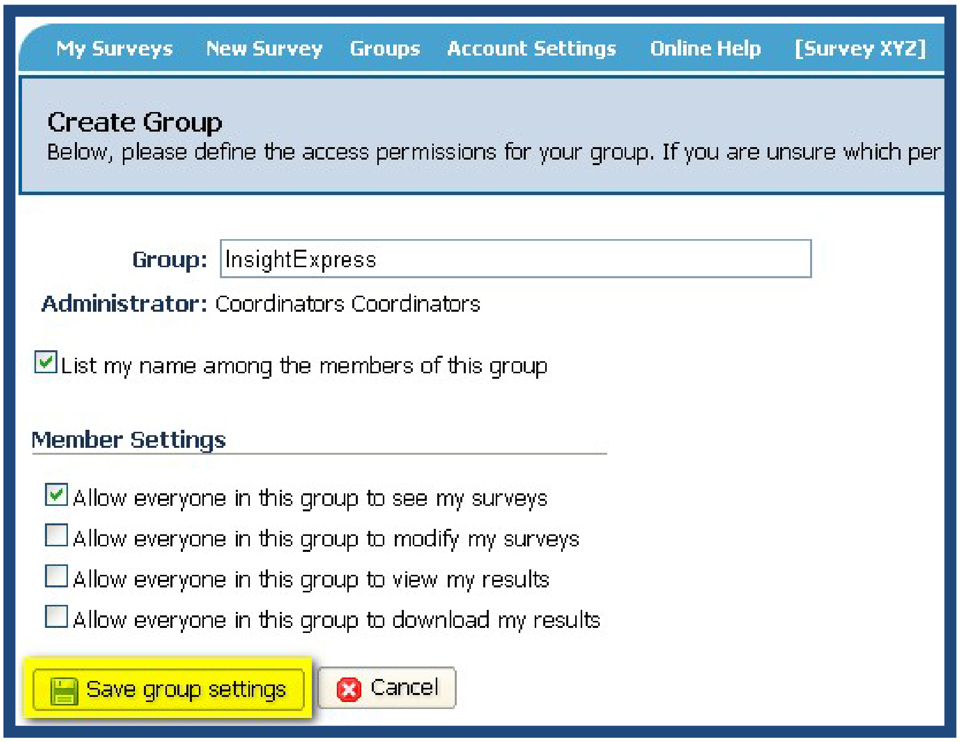
D. GROUPS AND SHARING

1. CREATING A GROUP

To create a group, click on **Groups** then click on **Create a new group**.

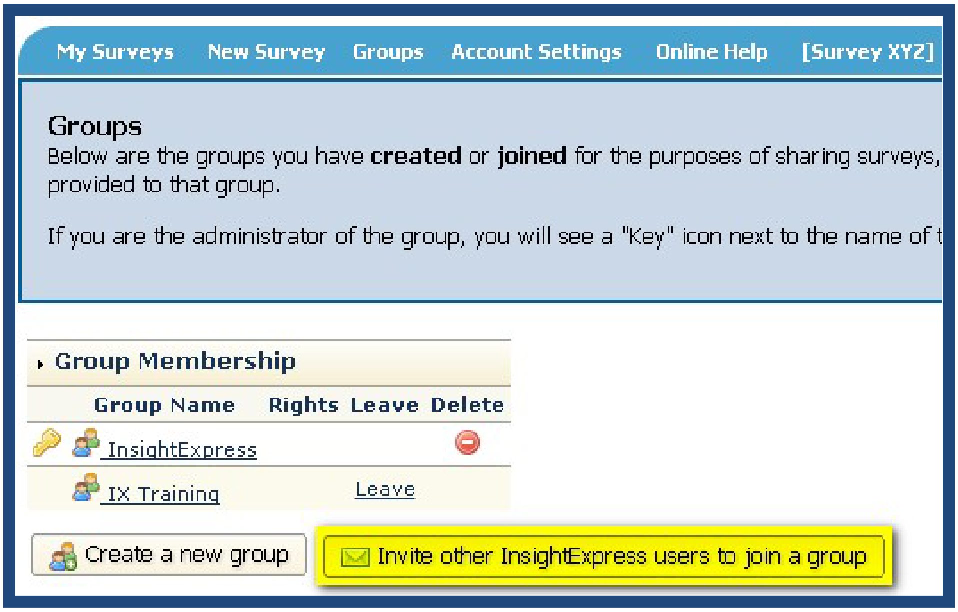


Next, choose a name for the group that you are creating. You may also set permissions to your group by checking off the appropriate settings below:



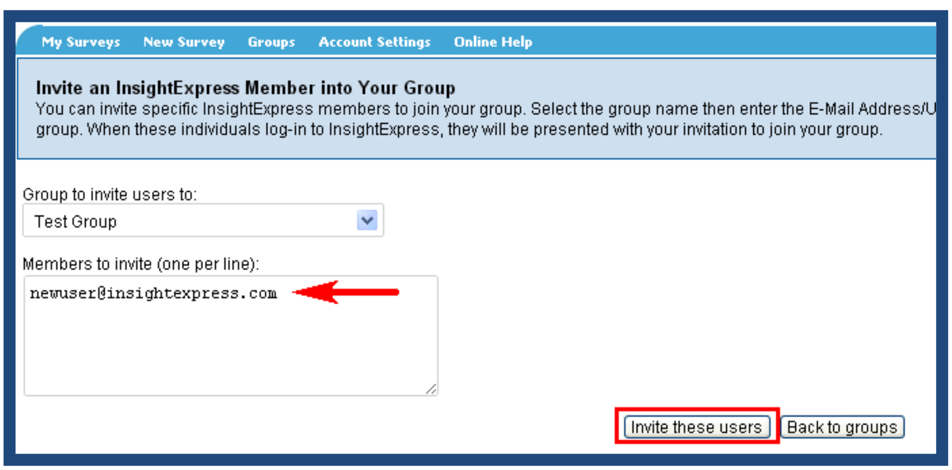
After naming the group, click on button **Save group settings**.

After creating the group, you will be given the option to invite other InsightExpress users. Click on the option titled **Invite other users to a group**.

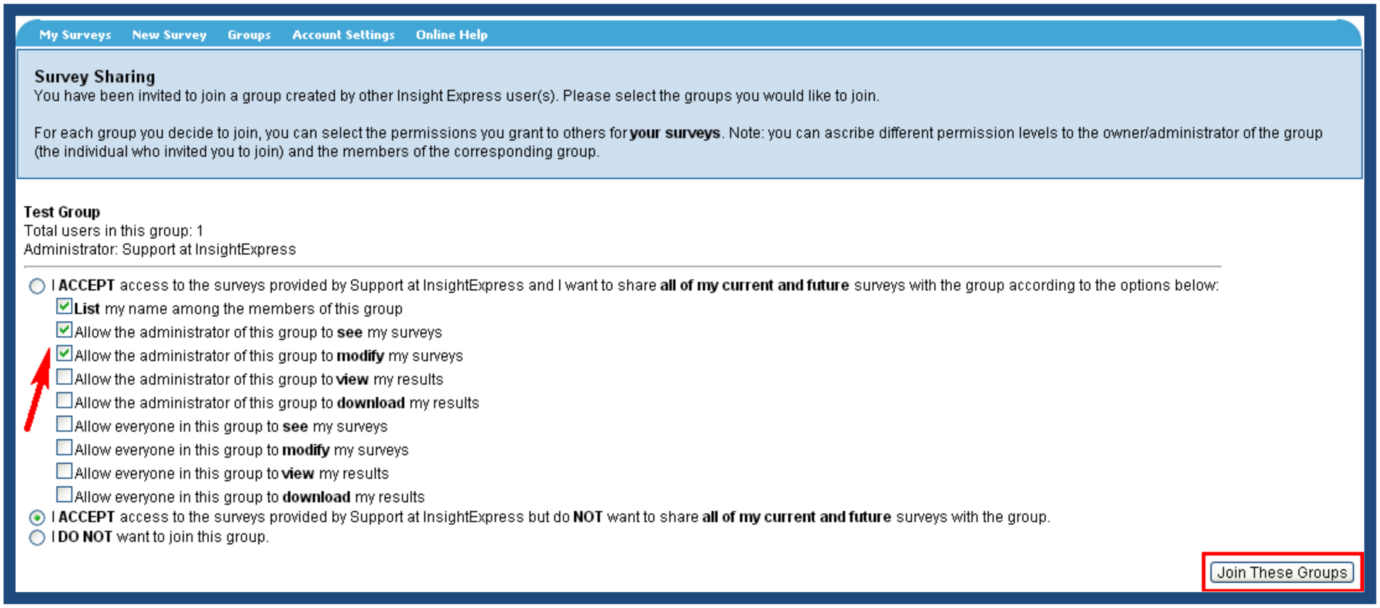


In the text box, insert the email of the user(s) you would like to invite into the group.

Please note: *The person you are inviting to the group* *<u>must have an InsightExpress account</u>*.



The user(s) that have been invited to the group will need to log into their account and accept the invitation to join the group. The invitation will appear as soon as the user logs in.



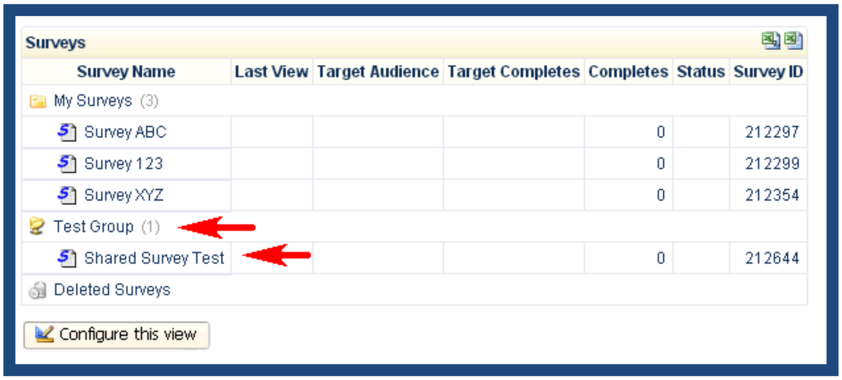
From this menu, a user can:

1. Accept full access to surveys shared by the group administrator and share every existing survey in their account with the group
2. Accept full access to surveys shared by the group administrator, but not share every existing survey in their account with the group
3. Decline the group invitation

The checkboxes allow a user to grant specific levels of access to the group and group administrator. Once these are all set, make sure to click **Join These Groups**.

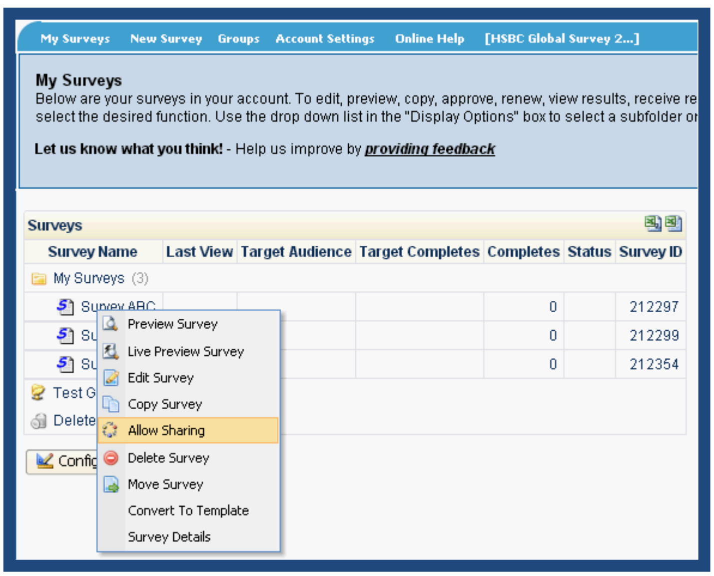
These settings can be changed later in the **Groups** menu of the account under **Manage groups**. Once the user(s) accepts the invitation, you may begin to share surveys.

Once you have been added to a group, the group name will appear on your **My Surveys** page that you see upon logging in. To view all surveys shared with the group, left-click the group name.

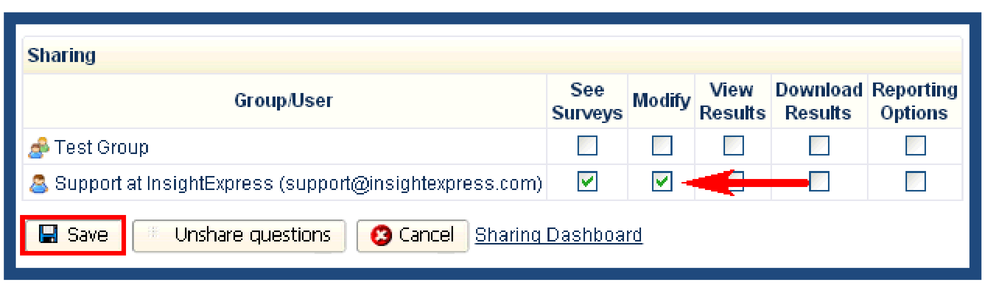


2. SURVEY SHARING

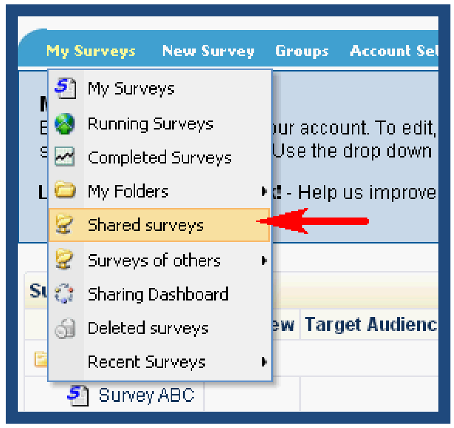
On the **My Surveys** page, click on the survey you would like to share and select **Allow Sharing**.



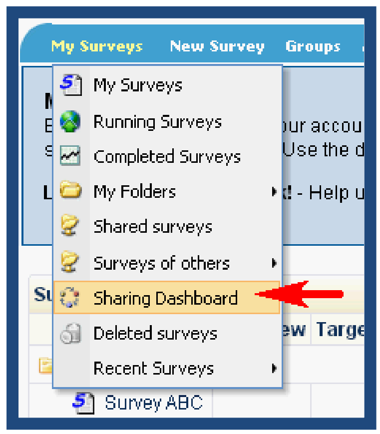
Here, the group administrator may set individual permissions for each shared user, or share the selected survey with a previously created group. You may indicate special permissions that you would like to give to each shared party by checking the corresponding boxes. Once you are done selecting the specific permissions for that survey, click **Save**.



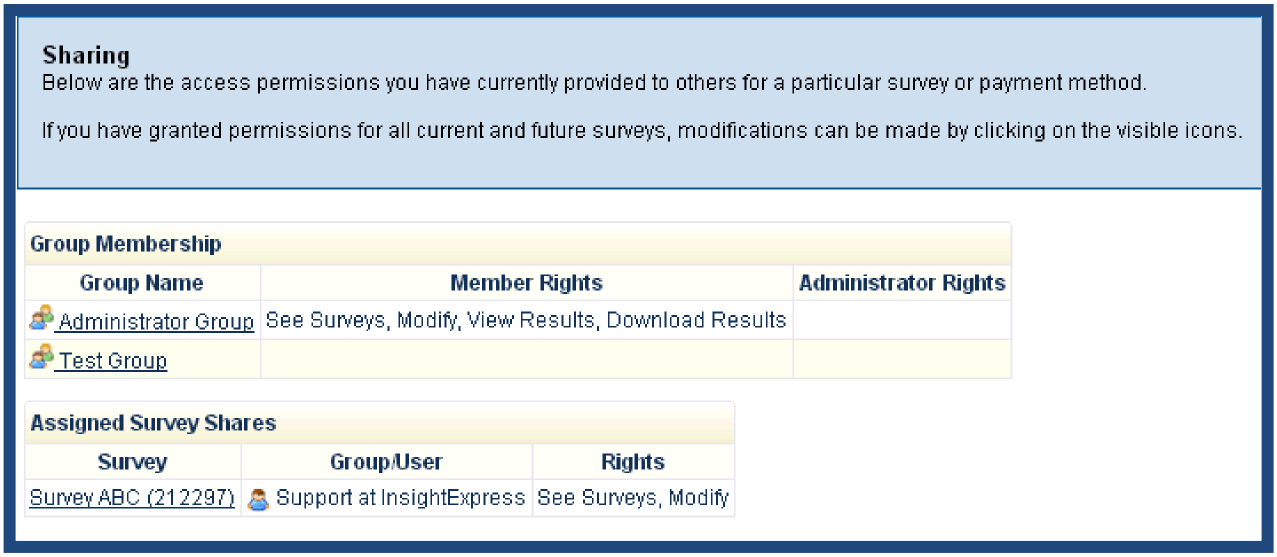
Once a survey has been shared in this way, the invitee may access it within the **Shared Surveys** folder.



To view an overview all surveys/groups shared from your account, select **Survey Dashboard**.



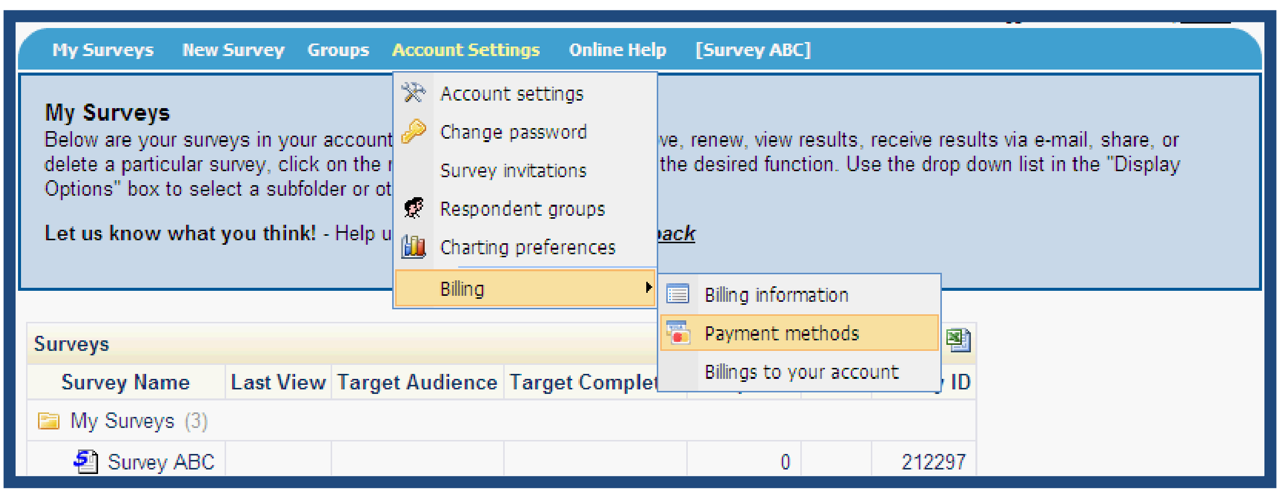
On this page, the **Group Membership** section will list all groups connected to your account along with the assigned rights of each. This page also contains **Assigned Survey Shares,** which lists each survey shared from your account, who it is being shared to, and the rights that you have assigned.



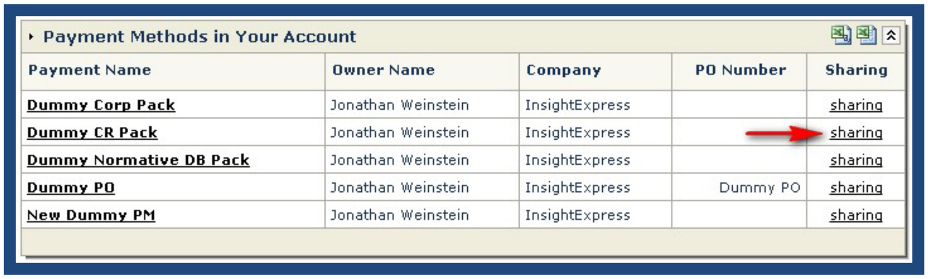
3. SHARING PAYMENT METHODS

In order for a user to launch a survey off of their company's payment method, that user **must be part of a payment group (CR Pack group)**.

<u>If you are the owner of a payment method and would like to share it with another InsightExpress user</u>, first follow the instructions for group creation and membership outlined within the **Creating a Group** section located on page **<u>112</u>**. Then go to **Account Settings/Billing/Payment Methods**.



This will take you to the **Payment Methods** page. All the payment methods owned by this account should appear here. Select **sharing** to grant access to other InsightExpress members.

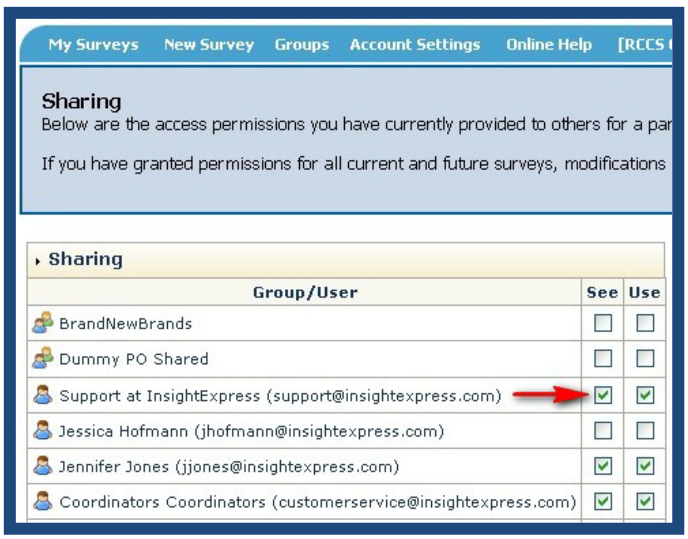


Payment Methods in Your Account

Payment Name	Owner Name	Company	PO Number	Sharing
Dummy Corp Pack	Jonathan Weinstein	InsightExpress		sharing
Dummy CR Pack	Jonathan Weinstein	InsightExpress		sharing
Dummy Normative DB Pack	Jonathan Weinstein	InsightExpress		sharing
Dummy PO	Jonathan Weinstein	InsightExpress	Dummy PO	sharing
New Dummy PM	Jonathan Weinstein	InsightExpress		sharing

***Please note:** payment methods that have been shared WITH this account, but are not owned BY this account, will **NOT** appear on this list.* A payment method can only be shared from the Payment Owner's account directly.

This will then take you to the **Sharing** page. Grant access to the group member who you'd like to share the payment method with by checking off the appropriate boxes:



See allows the user to see the name of the payment method when going to approve a survey.

Use allows the user rights to launch surveys off of this payment method.

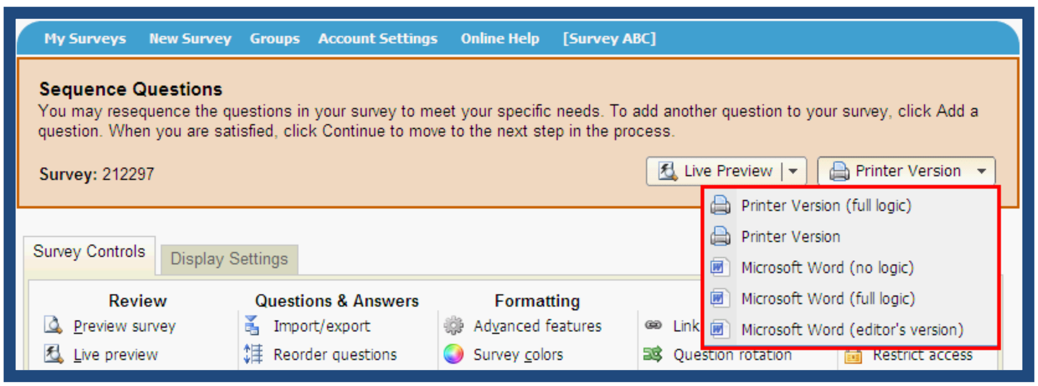
When you are completed with setting the appropriate sharing preferences, select the **Save** button.

E. MISC.

1. PRINTER VERSIONS

The Printer Version Menu allows you to export your survey into a variety of formats. This can make reviewing your survey, or distributing it to others to review, and easy process.

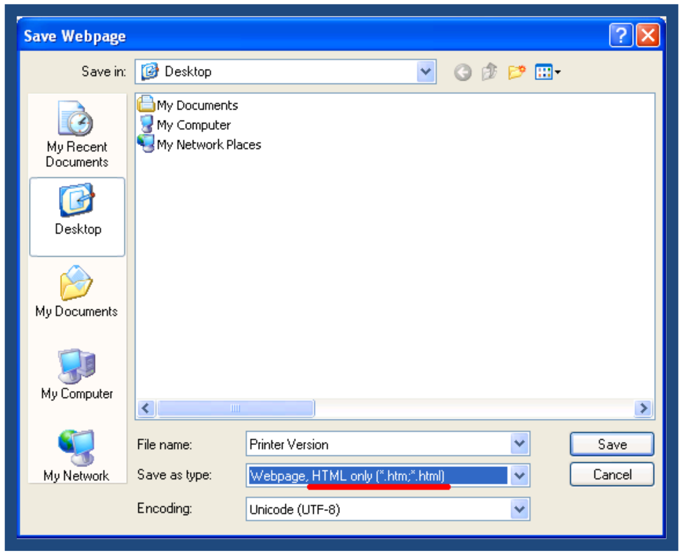
To access your survey's various printer versions, click on the **Printer Version** link at the top of the Sequence Questions page (as indicated below).



Each printer version offers various levels of detail depending upon which survey elements you are interested in reviewing. The various detail levels are as follows:

- **Printer Version (full logic)**: Shows all survey logic. Included within this version are all survey questions, answer choices, skipping logic, question attributes, etc. This version also contains information such as survey name, date of survey creation, target completes and the price of the survey.
- **Printer Version:** This version will display survey content and structure in a clean layout without any logic, skipping, quotas, tags, scripting, selective presentation, html, or style code.
- **Microsoft Word (no logic):** Will download the **full logic printer version** of your survey (as described above) as a .doc file.
- **Microsoft Word (full logic):** Will download the **no logic printer version** of your survey (as described above) as a .doc file.
- **Microsoft Word (editor's version):** Will download the **full logic printer version** of your survey in addition to survey coding tags, html, and other various style codes.

***Please Note:** If you would like to save the web browser version of your **survey for the purpose of e-mailing** it, be sure to save the file as "HTML only" (as shown below) Otherwise, certain printer version content may be lost when translated to other computers.*



2. UPLOAD IMAGES

Images may be uploaded into your survey in several places. You may upload images into the following areas:

- Question text
- Response list
- Concept question type (where you can upload multiple images)
- Header/footer of the survey you may move one or more questions throughout the survey, and reorder them at one time.

To upload an image click on the add image icon or image link add image.

All images must meet the following specifications:

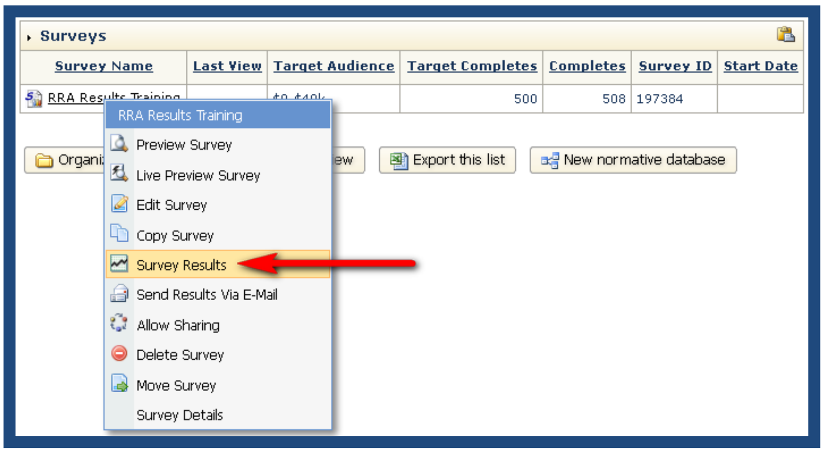
Format: .jpg, .gif, .png, or .bmp
File Size:** Less than 300 KB
Dimensions:** No more than 600 pixels in width

**Images larger than 300KB and with dimensions larger than 600px can be uploaded. However, images are constrained to 600 automatically.

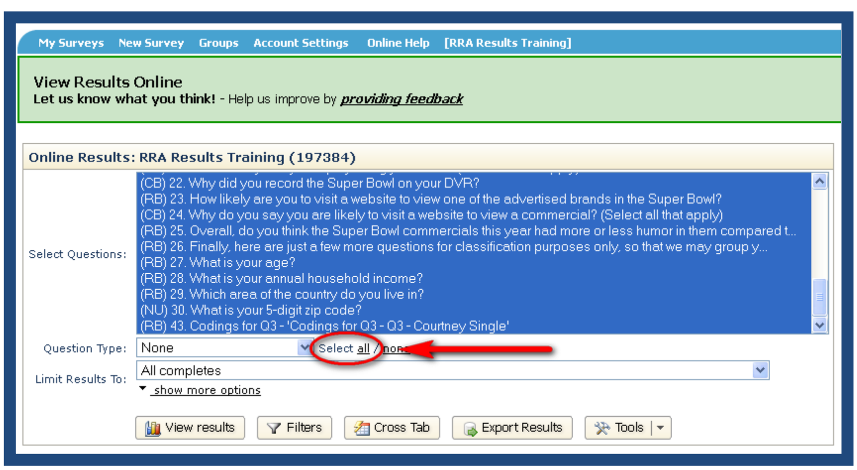
F. SURVEY RESULTS INTERPRETATION

1. VIEW RESULTS ONLINE

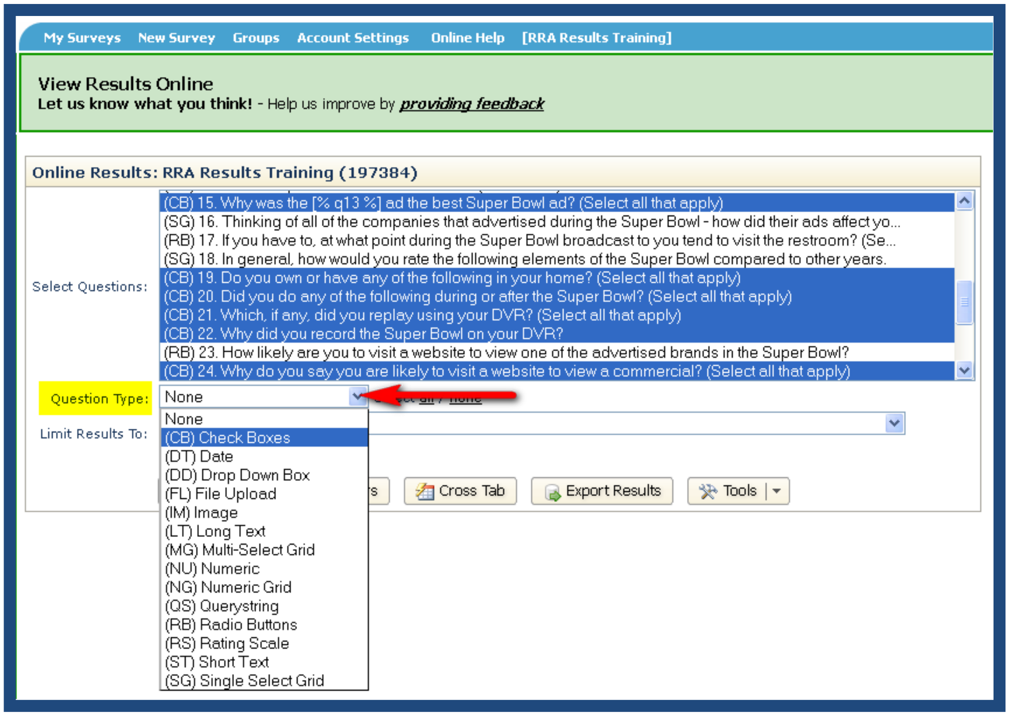
Survey results are available in real-time via our Web-based reporting features. Online results include: cross-tabulation, confidence intervals, and banner points/filtering functionality. This survey toplines feature is helpful in accommodating advanced analytics, results publishing, and reporting on our innovative question types. To access the results of your survey, left click the survey name in your "My Surveys" page and select **Survey Results**.



After selecting this item, you will be brought to main results page of the survey you are working with. To view the results of your survey directly online, you must first choose **Select all** beneath the dropdown list of questions within your survey. If you only want to view specific questions and not each question of your survey, highlight the specific questions you would like to review using the Shift key on your keyboard.

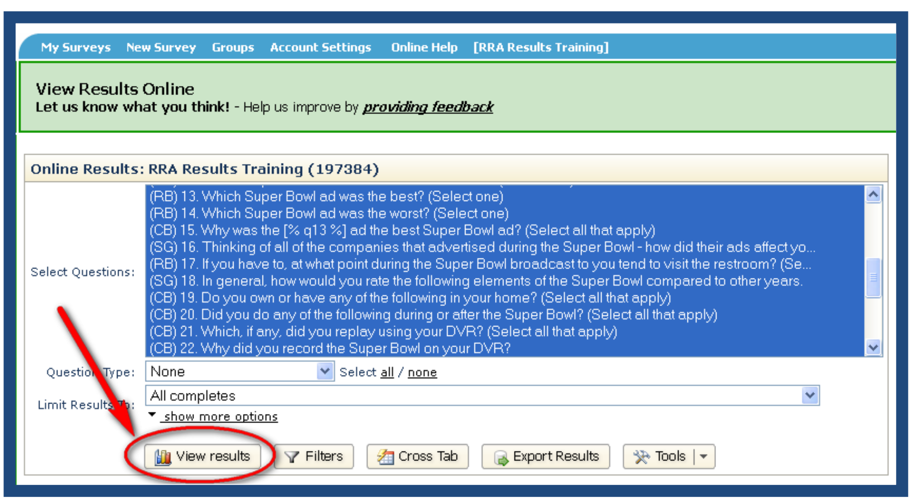


If you would like to view questions of a specific type (Radio Button, Open-ended, etc.), you can do so by selecting a specific format next to the **Question Type** viewing option.



This feature will hightlight each question within the survey that is of the type specified.In the example above, **Check Boxes** was chosen and each question that contains a **CB** next to its question number has been highlighted.

After choosing the specfic questions you would like to view, you will then click on the **View Results** button, as shown below:



This will generate both a chart with frequencies and percentages of the responses, as well as a graph. All open ended question types will contain only a chart with the responses of each individual

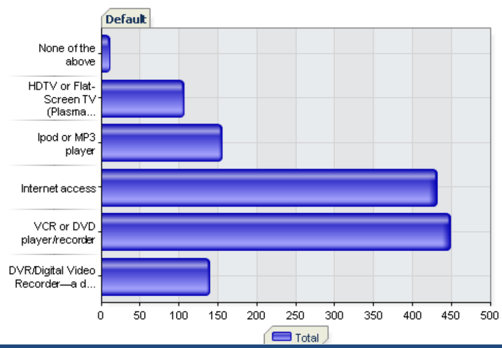
The following are examples of various charts and graphs that populate for each question type:

Check Box/Drop Down/Radio Button Questions:

Do you own or have any of the following in your home? (Select all that apply)

Default

	Total	
Response	**N**	**%**
Total	**493**	**100.000**
DVR/Digital Video Recorder—a device that records, fast forwards, plays back programming without a video tape	139	28.195
VCR or DVD player/recorder	449	91.075
Internet access	431	87.424
Ipod or MP3 player	155	31.440
HDTV or Flat-Screen TV (Plasma, LCD)	106	21.501
None of the above	11	2.231



Open-end Response:

Thinking of Super Bowl advertising, what is the most memorable ad - during the game or halftime - that you recall seeing **this year**?

Total

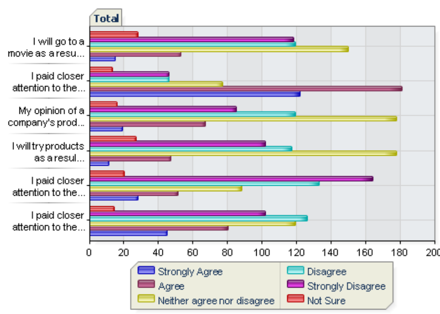
N=465
bud light
Budwieser commercials
Sir Paul McCartney
bud
bud
the beer commercial with the streaking sheep
magic refrigerator
i don't know
the hummer ad
i cant remember they were all so great
the add for diet pepsi. Brown and bubbly?
Budweiser Streaker ad

Single Select and Multi Select Grids:

Please rate how much you agree or disagree with the following statements.

Total

	Total		Strongly Agree		Agree		Neither agree nor disagree		Disagree		Strongly Disagree		Not Sure	
Response	**N**	**%**	**N**	**%**	**N**	**%**	**N**	**%**	**N**	**%**	**N**	**%**	**N**	**%**
Total	**488**	**100.000**												
I paid closer attention to the commercials than the actual game this year	486	99.590	45	9.259	80	16.461	119	24.486	126	25.926	102	20.988	14	2.881
I paid closer attention to the halftime show than the actual game this year	484	99.180	28	5.785	51	10.537	88	18.182	133	27.479	164	33.884	20	4.132
I will try products as a result of seeing them advertised during the Super Bowl	482	98.770	11	2.282	47	9.751	178	36.929	117	24.274	102	21.162	27	5.602
My opinion of a company's products are enhanced if I see them advertised during the Super Bowl	484	99.180	19	3.926	67	13.843	178	36.777	119	24.587	85	17.562	16	3.306
I paid closer attention to the commercials during the Super Bowl than I do to everyday ads	485	99.385	122	25.155	181	37.320	77	15.876	46	9.485	46	9.485	13	2.680
I will go to a movie as a result of seeing a commercial during the Super Bowl	483	98.975	15	3.106	53	10.973	150	31.056	119	24.638	118	24.431	28	5.797



Additional charting options are available by left-clicking anywhere on the graph (see below). These options include: **cross-tabulation of data, question options, exporting results in different formats, and emailing results.**

4. How frequently do you have desserts? (Please select one)

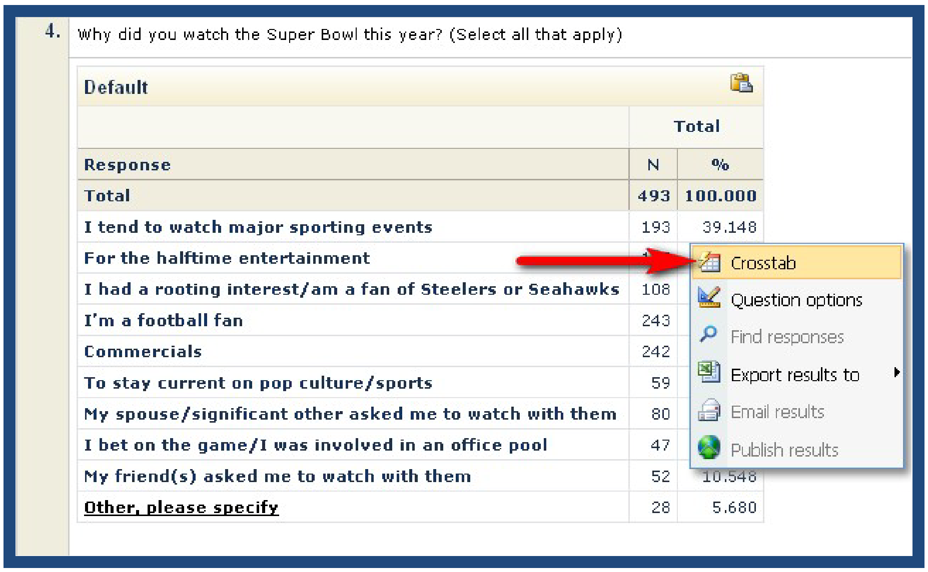
All completes

	Total	
Response	**N**	**%**
Total	**1125**	**100.000**
Three or more times a week	342	30.400
One or two times a week	370	32.889
More than once a week	**712**	**63.289**
One or two times a month	240	21.333
Less than once a month	133	11.822
Never	40	3.556
Mean		**2.252**

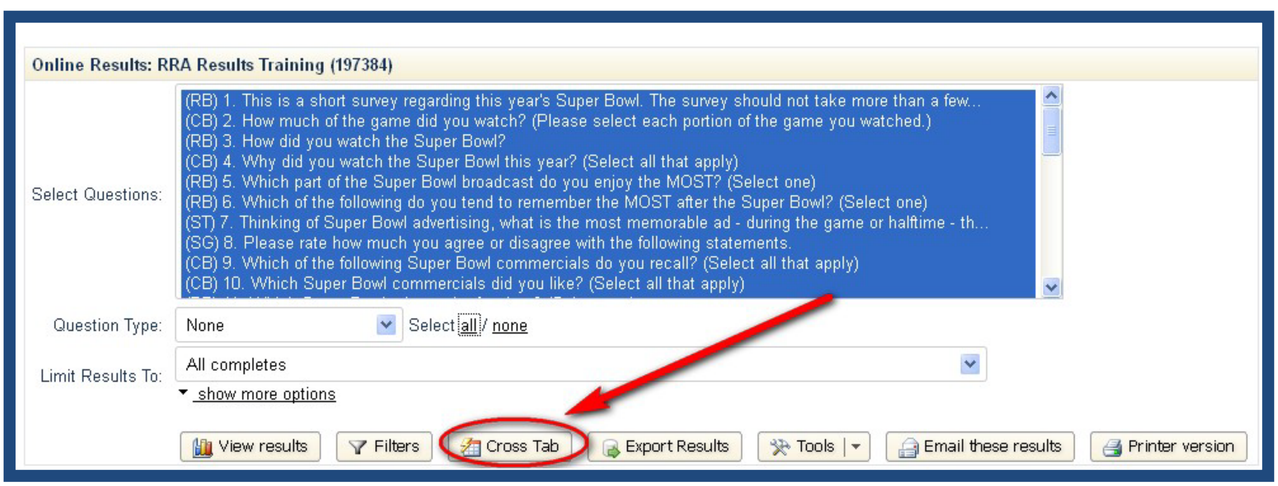
a. Cross Tabulation of Data

The **Cross Tab** feature lets you compare data from one question to another, or make comparisons among several questions.

One way to access the cross tab option is by clicking on one of the specific questions that you would like to compare and going to cross tab. Because Cross-Tabbing a question essentially means that you are creating a grid based on two elements, single select and multi select grid question types **cannot** be cross tabulated. The cross tabbing option for Numeric grids and any open response question type will also not be shown, as these question types are also not supported by this feature:

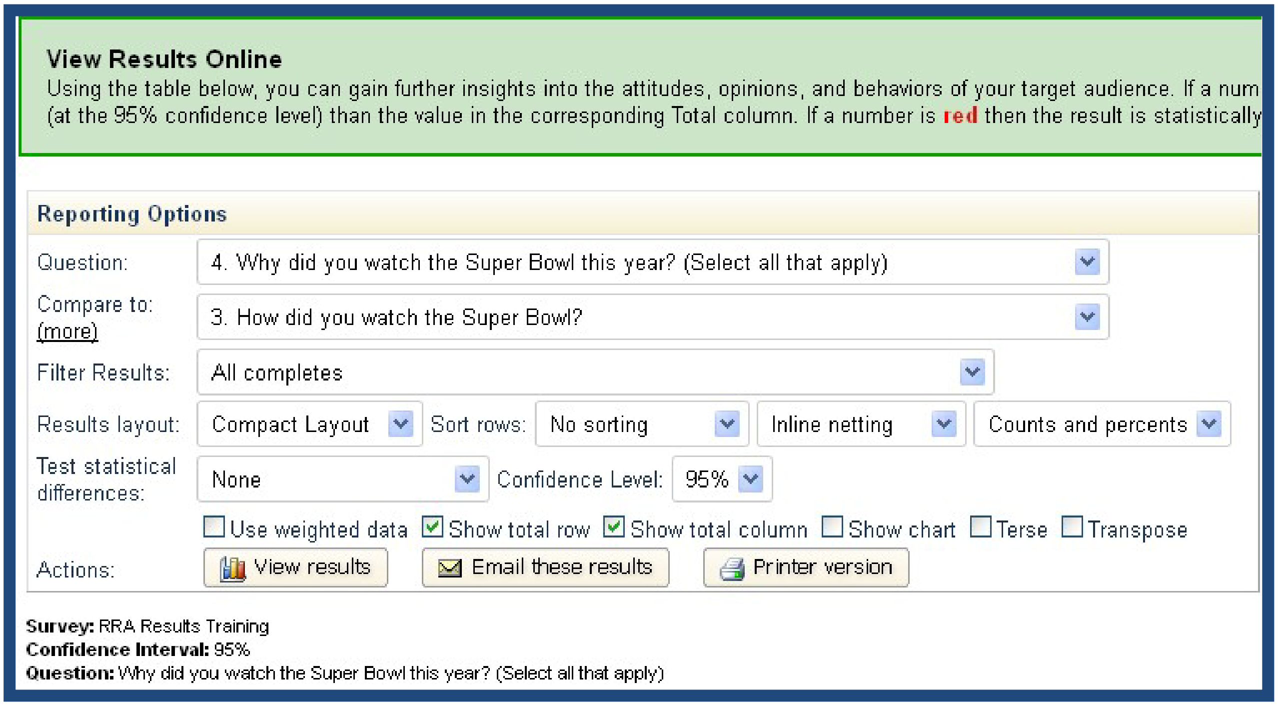


The other way to access the cross tab option is by clicking on the cross tab button as shown below:



On the cross tab page you will see the **Reporting Options** for the questions that you can include in your comparison. The default questions being compared are usually both set as the one you

were currently viewing. To cross tab this question against another, simply click on the drop down list in the 'Compare to' field and choose the single select or multi select question you wish to compare. Again, certain question types will not appear within this list, as open ended and grid questions cannot be cross-tabbed.



Definition of Reporting Options:
<u>Question:</u> the first question that will be included in the cross tabulation. This question will populate as the 'rows' of the cross tab chart.
<u>Compare to:</u> here you select the second question that will be included in the cross tabulation. This question will populate as the 'columns' of the cross tab chart.

- The "more" link will show all questions available for the crosstab at one time
- The "less" link will condense the questions available for the crosstab within the drop down format.

<u>Filter Results:</u> limit your crosstab to a specific segment
<u>Results Layout:</u> here you are able to specify how you would like to view the results platform

- *Compact percents are selected Layout* – shows the percents and the counts within one column in the chart, when counts and as an option
- *Expanded Layout* – separates the percents and the counts in their own columns, when counts and percents are selected as an option

<u>Sort rows</u>:

- *No sorting* – will display the results as the question appears to the respondent

- *Sort ascending* – will display the results where the total counts go from smallest to largest
- *Sort descending* – will the display the results where the total counts go from largest to smallest
- *No netting* – will not display any netting
- *Inline netting* – will display the netted values within the table (underneath the netted responses)
- *External netting* – will display the netted values as the last row of the table (not necessarily next to the netted responses)
- *Percents* – will only show percents
- *Counts* – will only show counts
- *Counts and Percents* – will show both counts and percents

Test statistical differences:

- *None* – will not show any statistical differences
- *Based on other columns* – will test any statistical differences across columns

Confidence Level : this is an interval in which a measurement or trial falls corresponding to a given probability. You can select confidence intervals of 80%, 85%, 90%, 95% or 99%

Show total row: includes a row that calculates the total row count

Show total column: includes a column that calculates the total column count

Show chart : will display a chart based on the crosstab information

Terse: removes the rows where the total number of responses is zero. Transpose – allows you to switch the location of the questions. For example, if you have Q2 as your rows and Q4 as your columns, checking transpose will make Q4 the rows and Q2 the columns.

Actions:

- *View Results* – after selecting the above crosstab options, you may view the results
- *Email these results* – you may email a snapshot of the survey results
- *Printer Version* – shows the snapshot of the survey results in a printable format

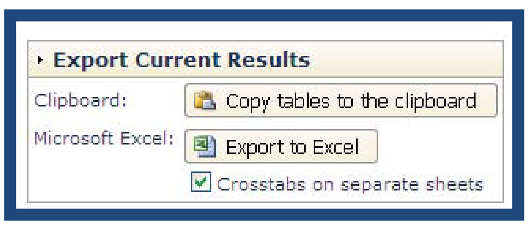
After selecting your reporting options, you can then click on 'View Results' in order to populate the cross-tab chart. It will appear similar to what is shown below:

Survey: RRA Results Training
Confidence Interval: 95%
Question: Why did you watch the Super Bowl this year? (Select all that apply)

Crosstab

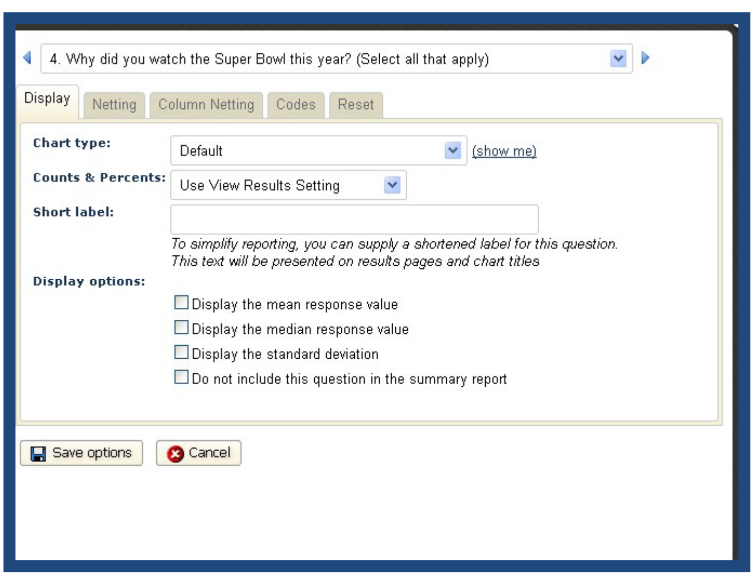
	How did you watch the Super Bowl?						
	Total	At home, alone	At home, with just my family	I HOSTED a Super Bowl party/gathering	I ATTENDED a Super Bowl party	In a bar/Sports Club/Restaurant	Other
Total	100.000% 492	15.854% 78	53.862% 265	7.927% 39	14.431% 71	3.252% 16	4.675% 23
I tend to watch major sporting events	39.024% 192	39.744% 31	37.736% 100	48.718% 19	40.845% 29	37.500% 6	30.435% 7
For the halftime entertainment	21.138% 104	20.513% 16	21.509% 57	17.949% 7	21.127% 15	31.250% 5	17.391% 4
I had a rooting interest/am a fan of Steelers or Seahawks	21.748% 107	15.385% 12	21.509% 57	38.462% 15	22.535% 16	12.500% 2	21.739% 5
I'm a football fan	49.187% 242	44.872% 35	49.057% 130	64.103% 25	54.930% 39	43.750% 7	26.087% 6
Commercials	48.984% 241	37.179% 29	48.302% 128	58.974% 23	57.746% 41	50.000% 8	52.174% 12
To stay current on pop culture/sports	11.992% 59	16.667% 13	10.566% 28	7.692% 3	15.493% 11	12.500% 2	8.696% 2
My spouse/significant other asked me to watch with them	16.057% 79	5.128% 4	21.509% 57	15.385% 6	9.859% 7	18.750% 3	8.696% 2
I bet on the game/I was involved in an office pool	9.553% 47	5.128% 4	7.925% 21	12.821% 5	15.493% 11	25.000% 4	8.696% 2
My friend(s) asked me to watch with them	10.569% 52	1.282% 1	2.642% 7	7.692% 3	47.887% 34	12.500% 2	21.739% 5
Other, please specify	5.691% 28	10.256% 8	5.660% 15	0.000% 0	2.817% 2	6.250% 1	8.696% 2
Mean							

Underneath the cross tab chart you will have the option to **Export Current Results.** This will export the all data on the current page you are viewing:



b. Question Options

Question options allow you to change the display of the data to make it more convenient to analyze. Within the question options, you have the ability to update the display of the results, set up netting, set up column netting, codes and reset the question options when you would like them to go back to default.

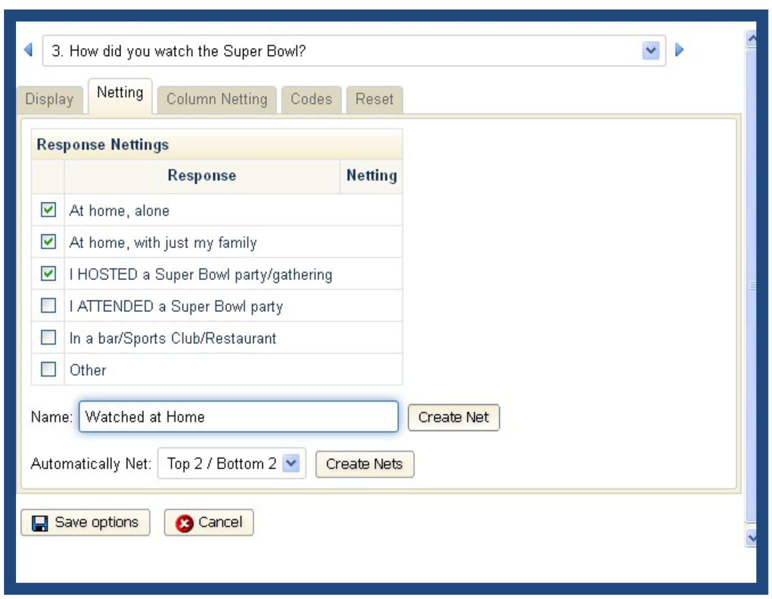


Display: Allows you to modify the way the results are being displayed on the results online page.

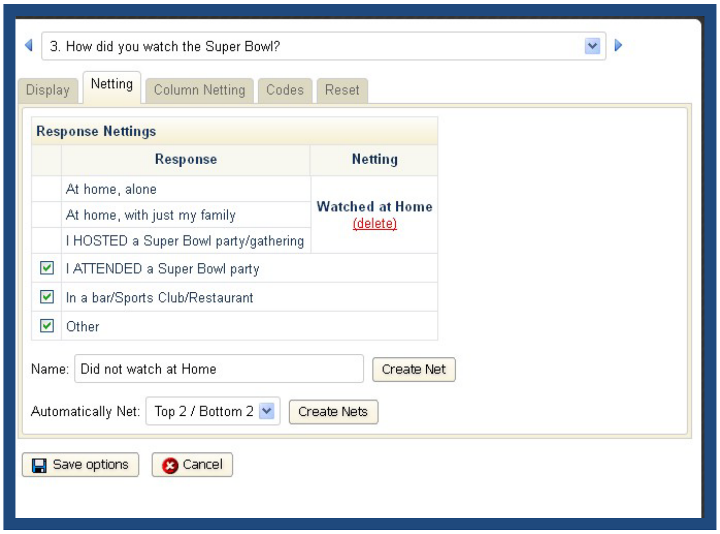
- *Chart type*- the ability to change the type of chart. Options include stacked bar charts, pie charts, and area maps.
- *Counts & Percents*-the ability to change this specific question's display of counts and percentages; can be either what the results setting is set at, percents by column, percents by row, counts, counts and percents by column, OR counts and percents by row
- *Short label*- the title of the chart is "default" unless otherwise specified here
- *Display options*- vary depending on the question type, however the standard options are to display the mean response value, the reverse mean (not available for checkbox questions), the median response value, the standard deviation, and the option to not include in the summary report

Netting: Allows you to combine the data for consecutive answer choices. Netting is a good tool when you would like to combine the data of 2 or more response rows that have similar definitions. For example, in the question below, 2 nets have been applied:

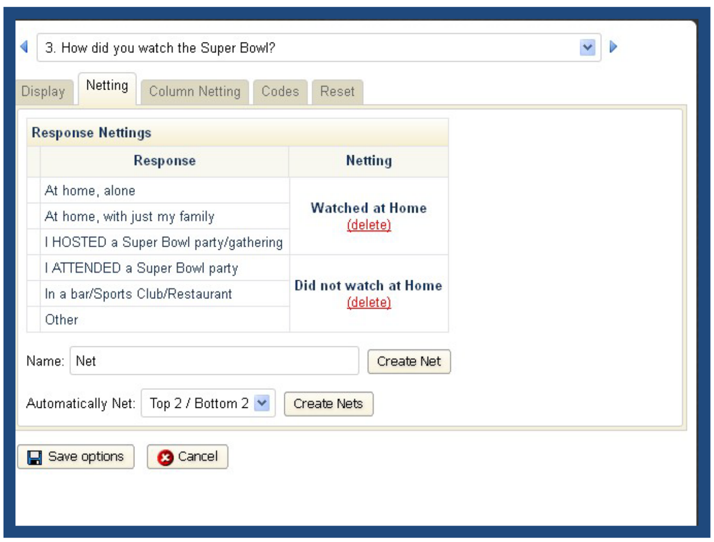
- One net for all response rows which would infer a respondent watched a game at home AND
- One net for all response rows that suggest a respondent did not watch a game at home



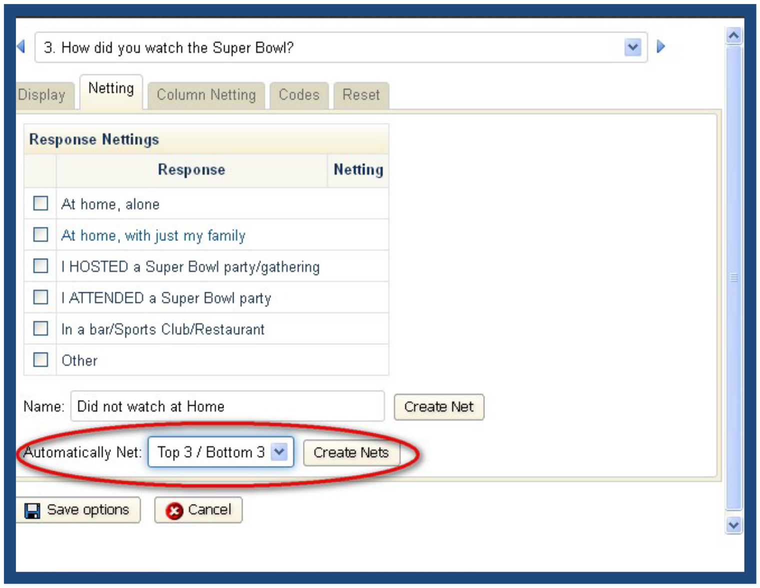
Simply select the responses that you would like to net, name the net you are creating, and click on **Create Net**.



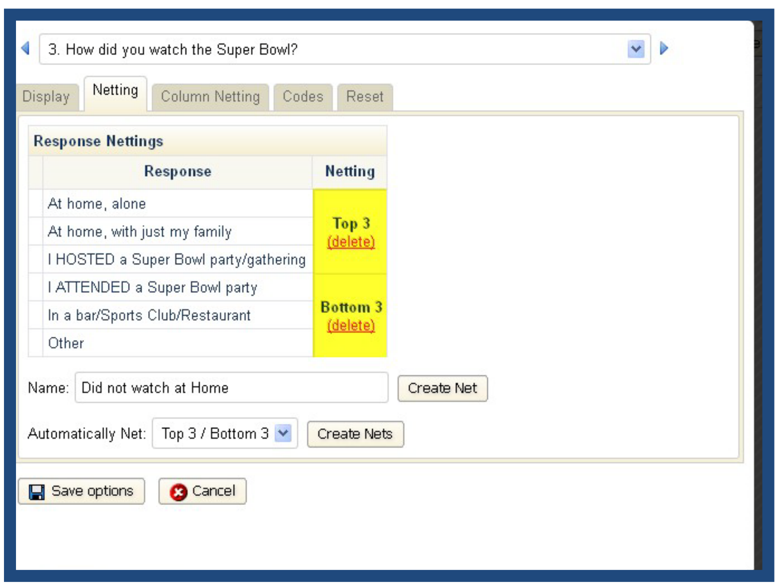
Once you have created your net, you can either move on to create another net, or delete the net you've already created.



If you are using a scale question, you can also automatically net the **Top 2/Bottom 2** responses or the **Top 3/Bottom 3** (as depicted below):



Once you have selected the proper netting scheme, click on 'Create Nets', and the nets will populate as follows:



To view your nets, click **Save options**, and your question will refresh with the nets in place:

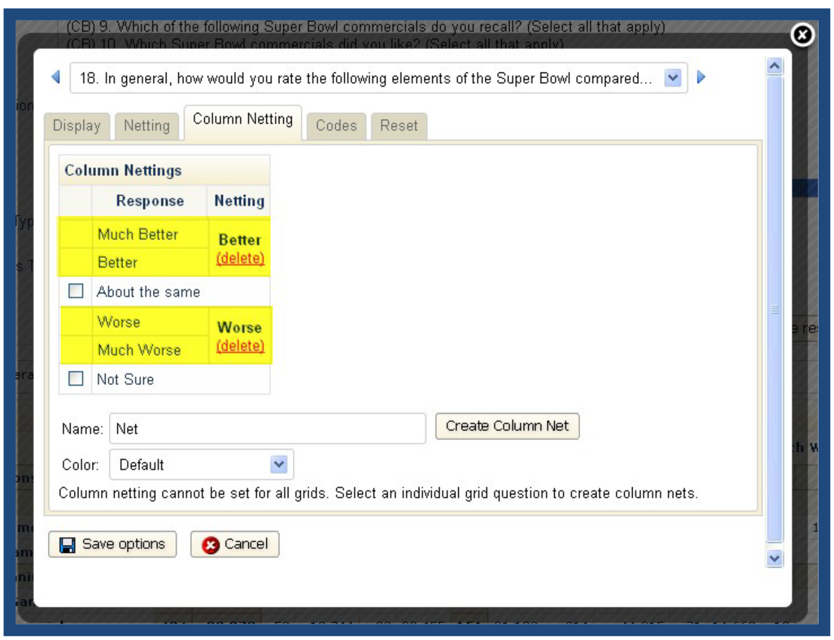
3. How did you watch the Super Bowl?

Default

Response	Total N	Total %
Total	492	100.000
At home, alone	78	15.854
At home, with just my family	265	53.862
I HOSTED a Super Bowl party/gathering	39	7.927
Watched at Home	382	77.642
I ATTENDED a Super Bowl party	71	14.431
In a bar/Sports Club/Restaurant	16	3.252
Other	23	4.675
Did not watch at Home	110	22.358

Only the counts chart (shown at top, above) will be updated with the net; the graph that appears below this data will not. The chart will show the counts and percents of each individual response row, as well as sums from the nets that were created.

Column Netting: Column netting may only be created on Single Select Grids. Creating column netting is the same as creating row netting for other questions. The column nets will appear within the columns in the counts chart.
Similar to the netting of response rows, column netting allows you to combine the data of 2 or more columns that have similar definitions. For example, in the question below, 2 nets have been applied. For all response rows inferring that a respondent believed that a particular criteria was 'better' than a previous year, a net was created and labeled 'Better'. For all response rows inferring that a respondent believed that a particular criteria was 'worse' than a previous year, a net was created and labeled 'Worse':



After clicking on **'Save Options'**, the chart will show the counts and percents of each individual response row, as well as sums from the column nets that were created:

18. In general, how would you rate the following elements of the Super Bowl compared to other years.

Total

	Total		Much Better		Better		Better		About the same		Worse		Much Worse		Worse		Not Sure	
Response	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Total	**489**	**100.000**																
Halftime Entertainment	**481**	**98.364**	39	8.108	86	17.879	**125**	25.988	134	27.859	100	20.790	57	11.850	**157**	32.640	65	13.514
Pregame	**481**	**98.364**	21	4.366	59	12.266	**80**	16.632	198	41.164	31	6.445	12	2.495	**43**	8.940	160	33.264
Beginning of Game	**962**		**60**		**145**		**205**		**332**		**131**		**69**		**200**		**225**	
The Game Itself	**484**	**98.978**	65	13.430	141	29.132	**206**	42.562	187	38.636	47	9.711	13	2.686	**60**	12.397	31	6.405
Commercials	**484**	**98.978**	52	10.744	99	20.455	**151**	31.198	214	44.215	71	14.669	13	2.686	**84**	17.355	35	7.231

Total

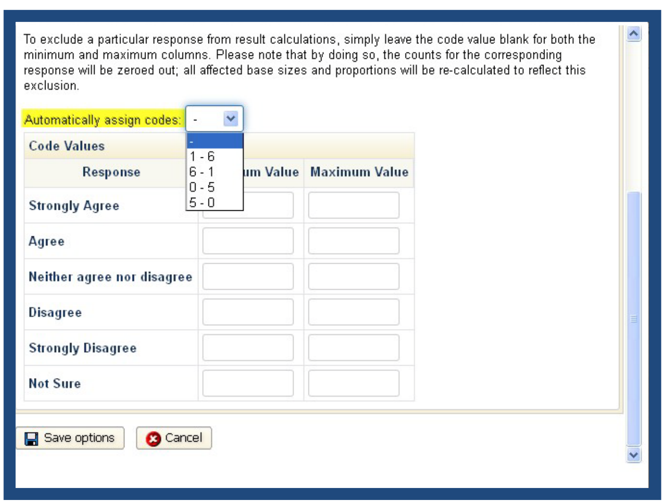
<u>Codes:</u> This section allows you to adjust how the tool codes the responses so that you can recalculate various functions like mean, median and standard deviation.

By default, questions are coded as follows:

Single selects (Radio button or Drop Down Questions): 0-N
Multi selects (checkbox questions): 1-N

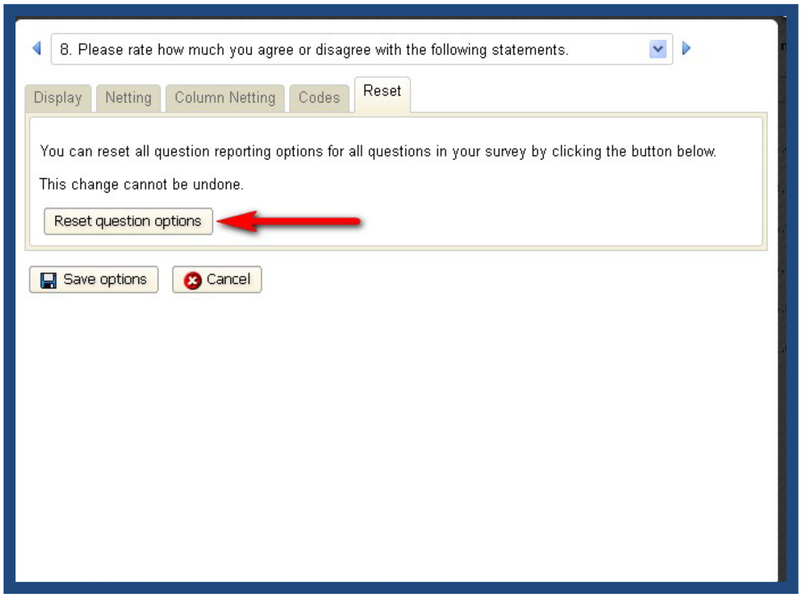
The default coding is shown below. To adjust the coding used in result calculations, you can select a sequence from the drop down menu or manually enter a numeric value or value range.

For example: If your response is an age range, such as 18-24, you can set your minimum value to 18 and you maximum value to 24 for that response. If your answer option is a point on a rating scale, and you only wish to have one code assigned to that response, simply enter the same value for both the minimum and maximum (as shown below).



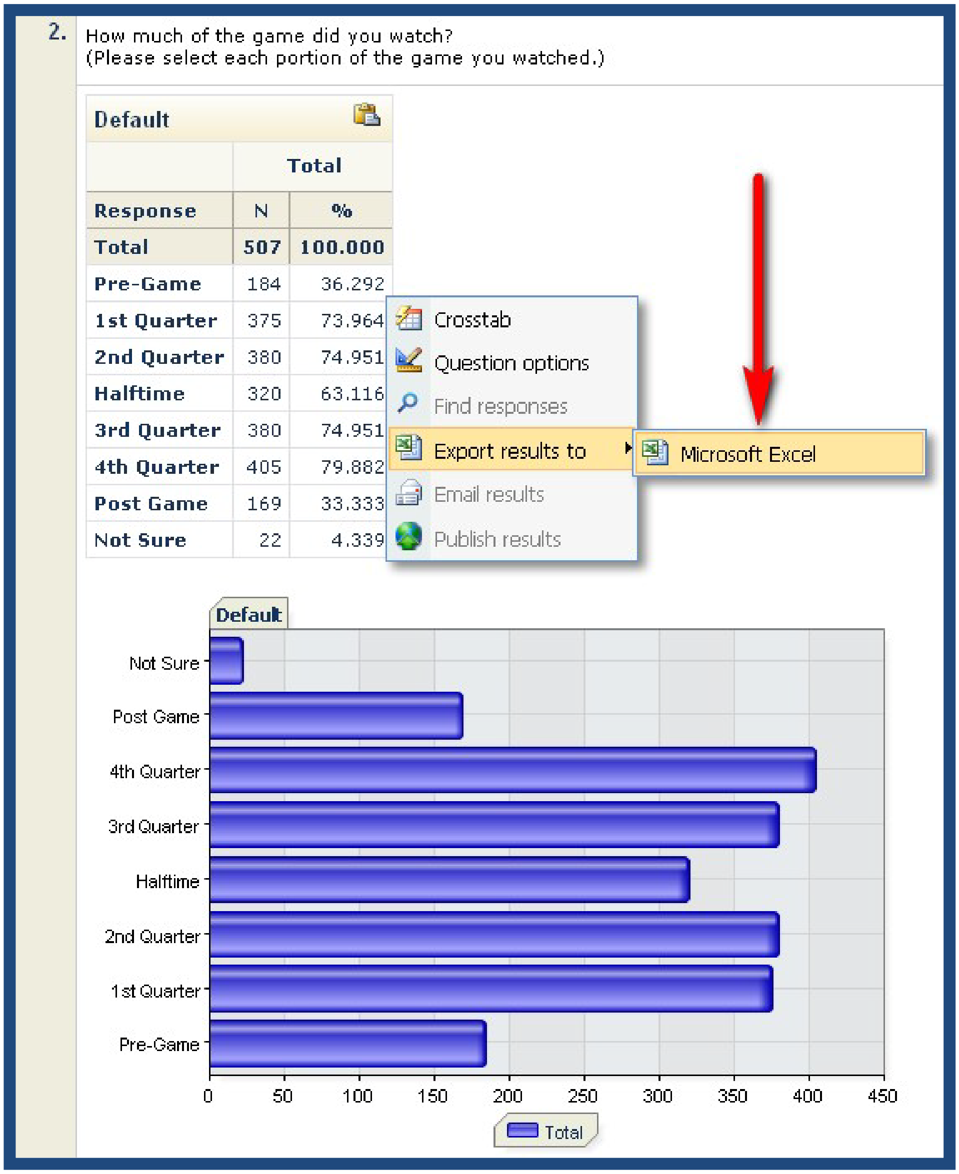
To exclude a particular response from result calculations, simply leave the code value blank for both the minimum and maximum columns. Please note that by doing so, the counts for the corresponding response will be zeroed out; all affected base sizes and proportions will be re-calculated to reflect this exclusion.

Reset: The reset option allows you to remove all of the reporting options that you have adjusted for each individual question. Clicking 'Reset question options' will remove all display options and coding, but will not remove any netting or column netting. To delete any nets placed within the question, you must click on the netting and column netting tab and delete each net that was created individually.



c. Exporting Individual Question Data and Current Page to Excel

There are two ways you can Export Results to Excel right from the 'Online Results' page; on an individual question level, and by the current question you have selected to view online. Exporting individual question data to Microsoft Excel: After selecting the question(s) you choose to view online from the question drop down list and clicking 'View Results', left click on an individual question to see a list of Question options. To export the results of this individual question, simply choose the **Export results to** option, as seen in the example below:

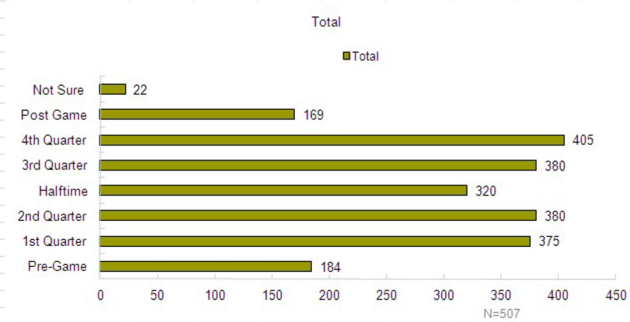


When data is exported in this regard, you will upload an Excel file which will look similar to the image shown below. A cover page will be shown on the first tab of the Excel file, and the question that is being exported will be shown on the second tab. The spreadsheet will contain a chart with percents and counts, as well as a graph similar to what is depicted on the online results platform:

Q2. How much of the game did you watch? (Please select each portion of the game you watched.)

Default

	Total	
Response	N	%
Total	507	100
Pre-Game	184	36.292
1st Quarter	375	73.964
2nd Quarter	380	74.951
Halftime	320	63.116
3rd Quarter	380	74.951
4th Quarter	405	79.882
Post Game	169	33.333
Not Sure	22	4.339

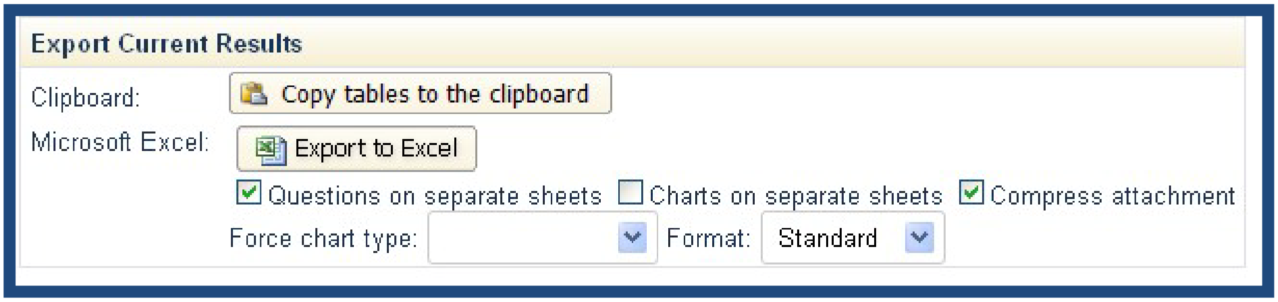


Both the style of the chart and the graphs can be customized through Excel. You are able to do things like change the color of the graph and change the type of graph being depicted right from Excel. If you are exporting open ended data, please note that only a chart containing the verbatim responses will be shown in Excel. This is also how open ended responses are shown on the online platform:

Q7. Thinking of Super Bowl advertising, what is the most memorable ad - during the game or halftime - that you recall seeing this year?

Total
N=465
bud light
Budwieser commercials
Sir Paul McCartney
bud
bud
the beer commercial with the streaking sheep
magic refrigerator
i don't know
the hummer ad
i cant remember they were all so great

Exporting the data of multiple questions to Microsoft Excel: From the online results platform, you may simultaneously export the data of all questions that you viewing at any given time. To do so, first select the questions whose data you would like to view. Next, select the "View Results" button, to display the requested data. You can then scroll to the bottom of this page where you will notice the "Export Current Results" box (shown below):



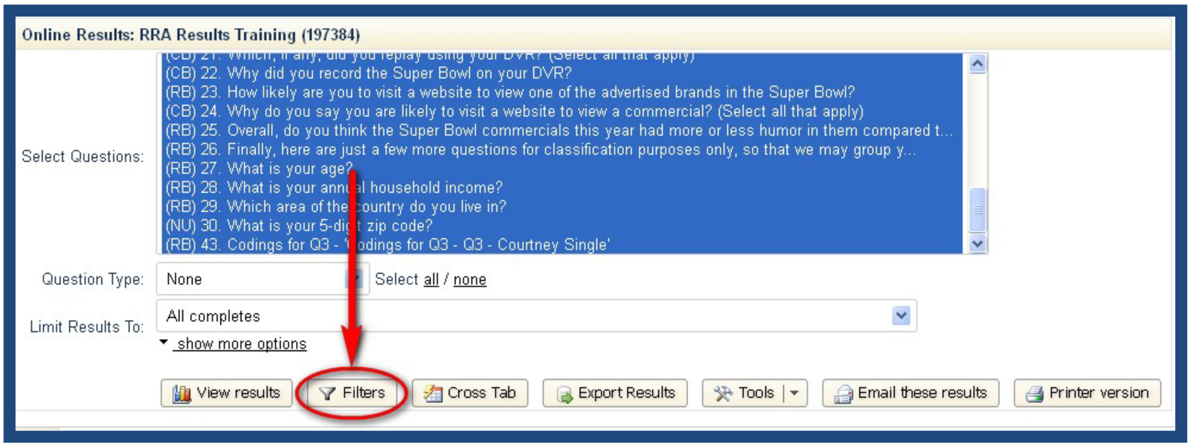
This tool allows you to do one of two things:
1. Copy the tables in your current view to the clipboard, allowing you to place these charts into presentations and Word documents
And
2. Export the current page to Excel.

When exporting this data to Microsoft Excel, you have several options:

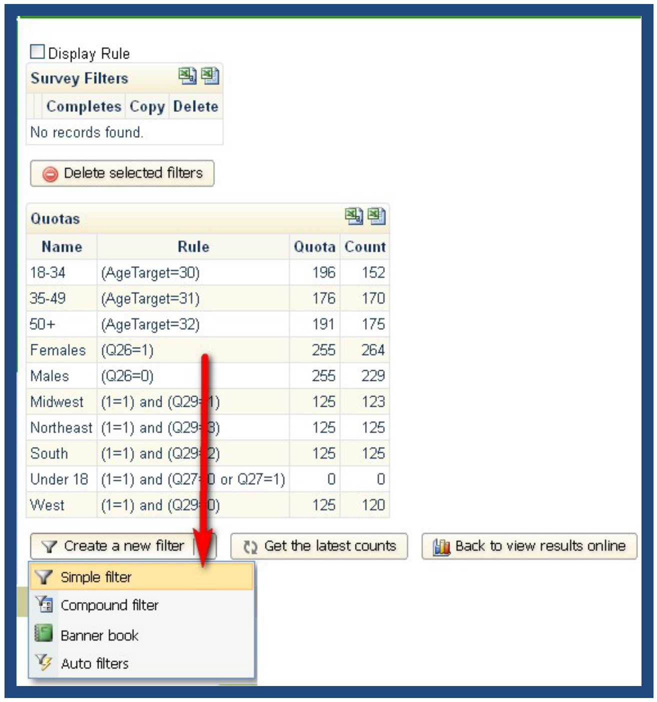
- You can choose to place each question on a separate page of an Excel spreadsheet.
- You can choose to have the charts (graphs) be shown on a separate page from the counts and percents table.
- You can decide whether you would like to export your results file as a compressed (.zip) or uncompressed (.xls) file.
- You may also force the chart type being exported. By default exported charts are formatted as stacked bar graphs.

2. FILTERS

Filters allow you to cut and/or display the responses of your data based upon specific criteria you define. If you need to define a specific subset of data that meets certain conditions, you can create filters within your data by following the steps below.
To set up filters select the **Filters** button on the **View Results Online** page.

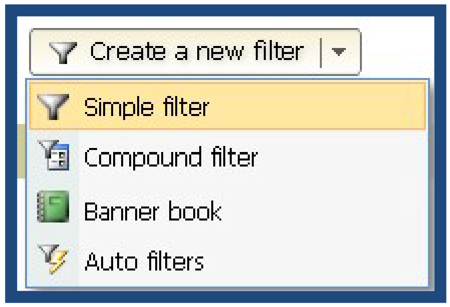


__Please note__: Any quotas that have been fielded in your survey will automatically show counts in the Filters section

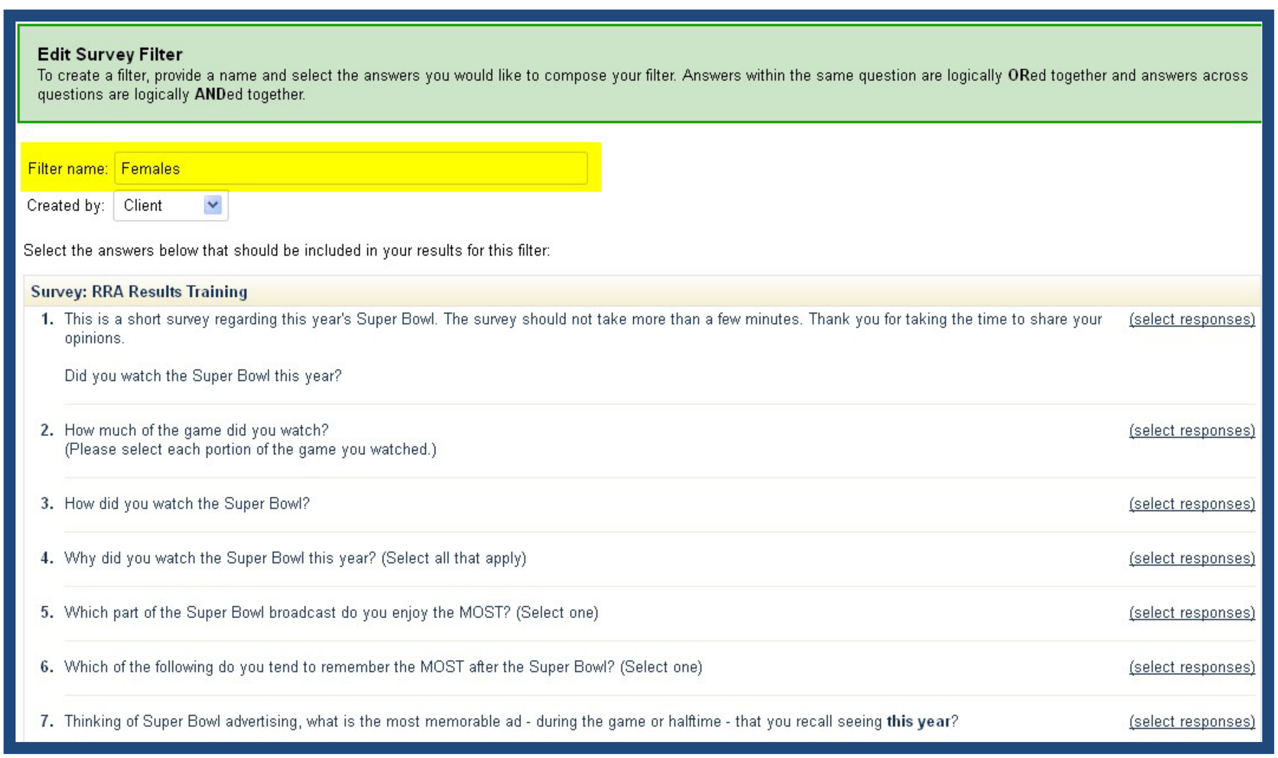

Display Rule
Survey Filters
Completes Copy Delete
No records found.
Delete selected filters
Quotas
Name Rule Quota Count
18-34 (AgeTarget=30) 196 152
35-49 (AgeTarget=31) 176 170
50+ (AgeTarget=32) 191 175
Females (Q26=1) 255 264
Males (Q26=0) 255 229
Midwest 125 123
Northeast 125 125
South 125 125
Under 18 0 0
West 125 120
Create a new filter
Get the latest counts
Back to view results online
Simple filter
Compound filter
Banner book
Auto filters

a. Simple filters

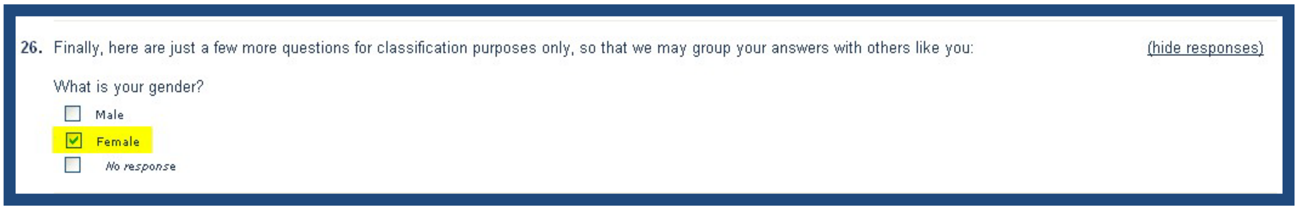
In many cases, you will need to single out a particular demographic of people in order to see a more detailed breakdown of data. To build these types of ‘simple filters’ for various respondent demographics (such as age, gender, region, etc.) choose ‘Simple Filter’ from the ‘Create a new filter’ drop down list:



Once you select **Simple Filter** you will be brought into the filter definition page, where the first step will be to name your simple filter. The filter below has been named “Females”.

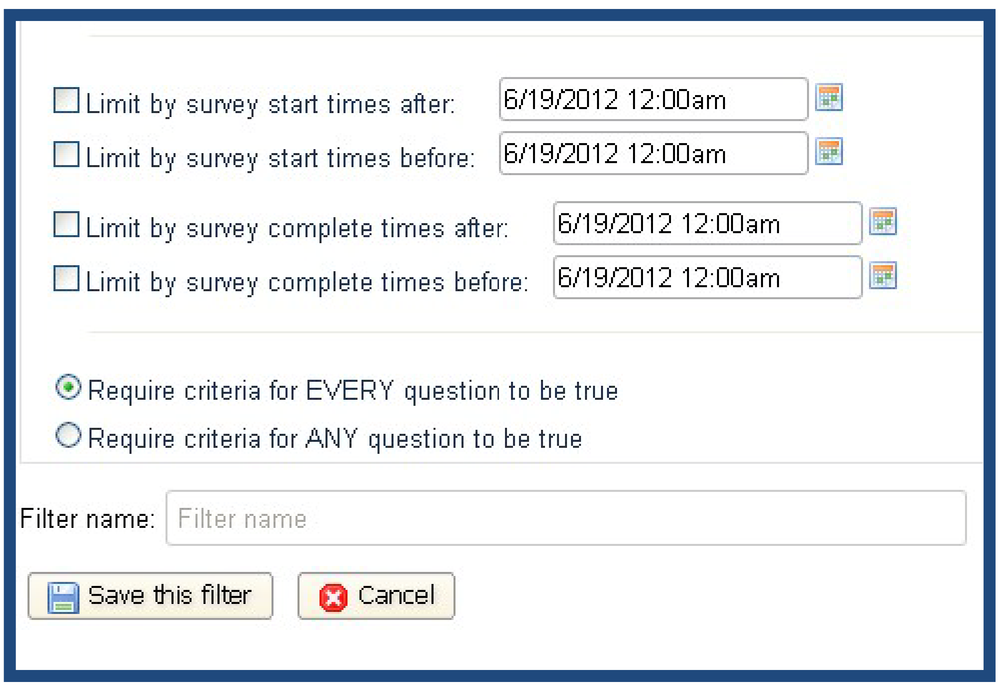


The next step in creating your **Simple Filter** is to define the filter criteria. To do this, click on the "Select Responses" link to the far right of any survey question. This will expand the question to show a list of responses which you may include within your filter. You may also choose to filter your data by respondents who did not answer a particular question.



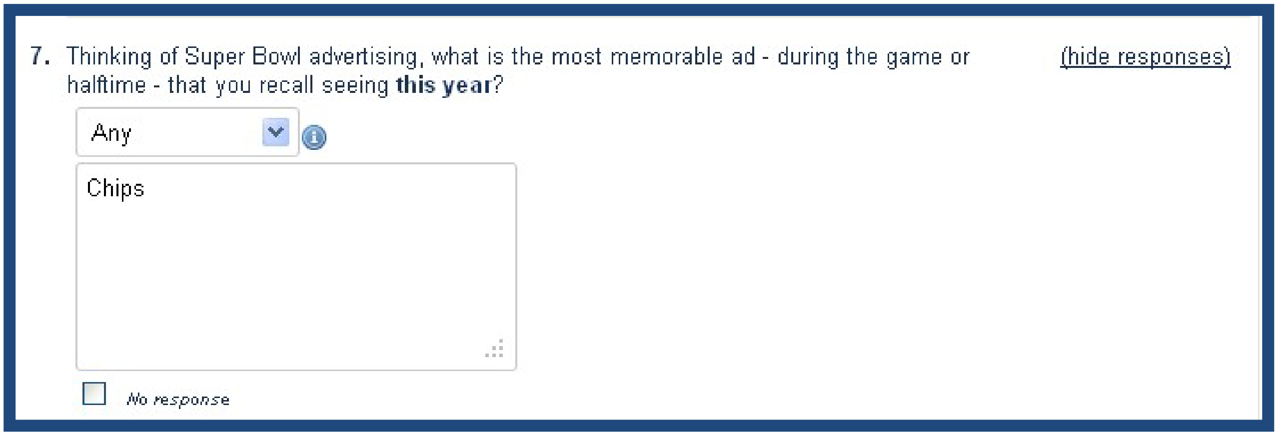
****Please note**: When creating simple filters, you may select more than one response in the same question or multiple responses between several different questions. If your filter is based on multiple questions, keep in mind that answers <u>within the same question are logically **OR**ed together by default</u>.* This *means that a respondent may meet any or all of the criteria that were defined within that filter in order to be counted within it.*

Answers across questions can be built with either **"AND"** or "**OR**" logic. This can be specified by scrolling to the bottom of the simple filter definition page and choosing to require criteria for **every question to be true** (AND logic)**,** or choosing to require criteria for **any question to be true** (OR logic)**:**

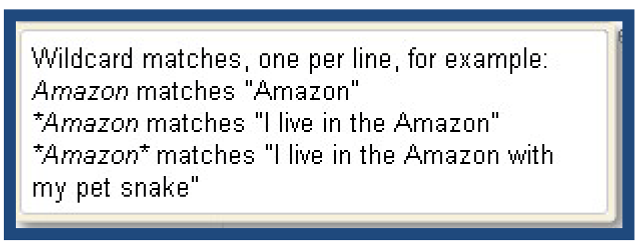


As shown above, you can also limit your filters based on respondent start time before and/or after date. You are also able to limit the filter based off of respondent completion time before and/or after date.

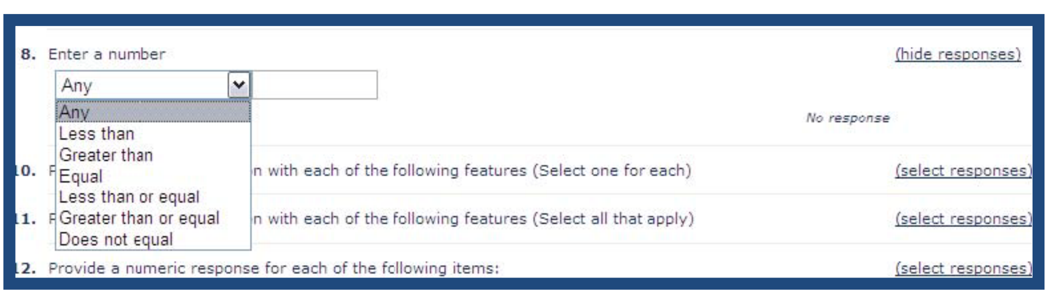
Open-ended questions allow you to enter specific text for your filter. You may set up the filter to include respondents who either did or did not answer in a certain way. You can also choose to filter by those that did not answer the question by checking off the ‘no response’ option below the open text field.
You would follow this same model if you wanted to filter by querystring value or respondent ID value:



You can also include the “wild card” character which is an asterisk (*). Below explains how to use the wild card character.



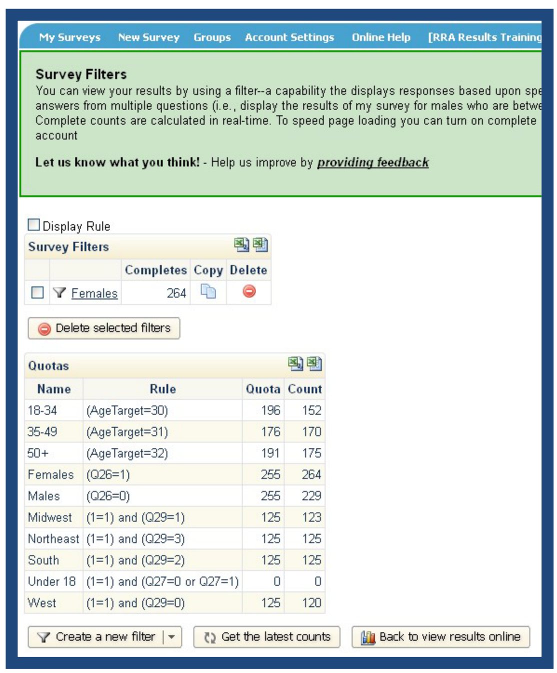
Filters for *numeric grid questions* may be created based on different values. To do so, insert a value and then specify whether respondents must have provided an answer less than, greater than, equal to, less than or equal to, greater than or equal to, or not equal to a specific value.



To create a *numeric grid question* filter, you may establish a minimum or a maximum answer choice value.

For example, to find people who eat five times a day, you would set both the minimum and maximum value boxes at 5. To find people who eat at least five times a day, you would only set the minimum box at 5. To find the top answer choice in a ranking question, you would insert a one (1) in both the minimum and maximum value boxes.

Once you have finished creating your **Simple Filter,** click on the **Save this filter** button. After the page refreshes, you will be brought back to the Filters page where you can view up-to-date counts of each filter or quota within your survey:



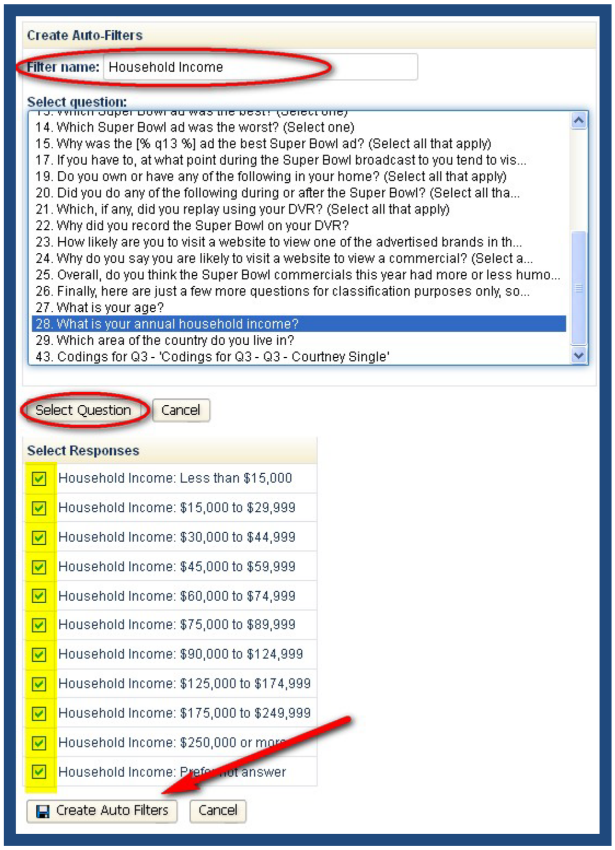
To update the criteria of a filter, simply click on its name and you will be brought back into its definition page. To delete it, select the red delete button located on the right-hand side. On the bottom of the page, you may also select “Get the latest counts” to update the number of completes the filter has captured on a running survey.

b. Auto-Filters

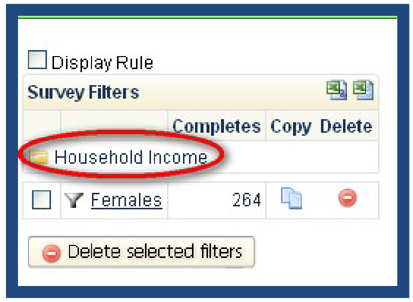
Auto-Filters create simple filters for each response row of a single select (drop down or radio button questions) or multi select (checkbox question).With a single click, you can great a separate filter for each age group within an age question, or each region or state within a question that asks a respondent about their geographical location.

To begin, choose **Auto filters** from the Filters dropdown list. You now must choose a label for your auto filters. The label can be anything from the question number to the question topic (age, gender, etc).

After the proper label is selected, choose the question for which you would like to automatically create filters and then select the **Responses**. Once you have selected the filters you would like to create, click **Create Auto Filters**.



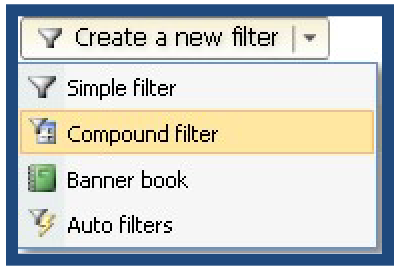
Once the page refreshes, you will be brought back to the main Filters page where you will now see a folder which will have the same title as whatever you have labeled your auto filters.



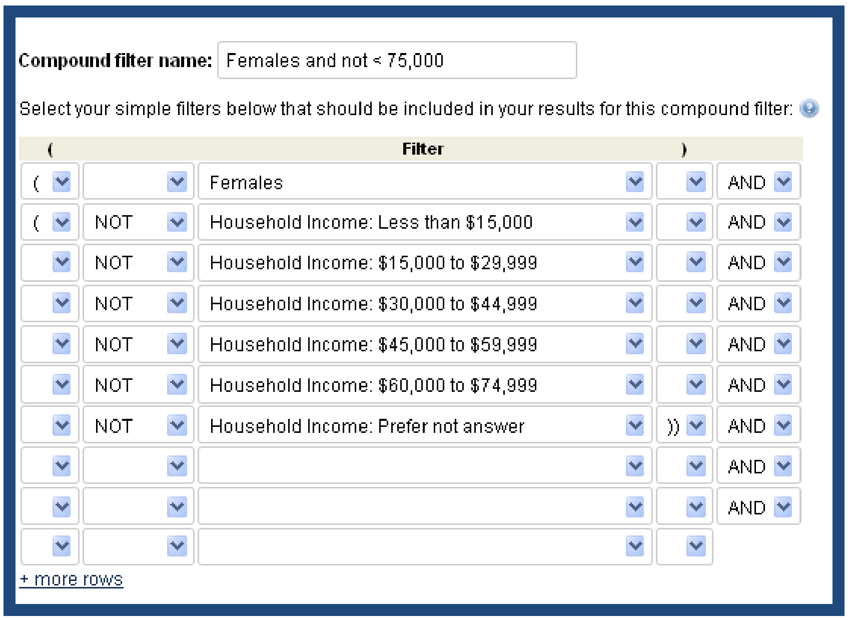
If you click on this folder, all auto filters created under this label will be present:

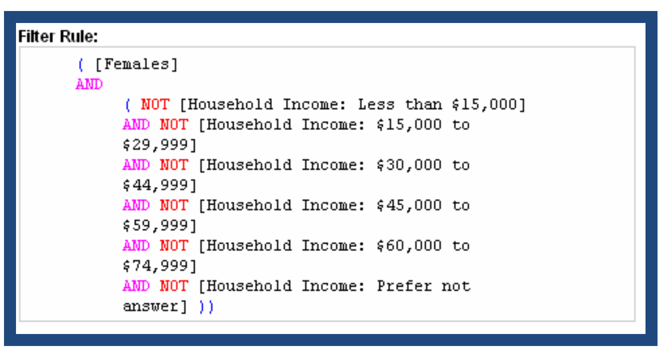
c. Compound Filters

Compound Filters allow you to create more complex filters using different logical statements including AND, OR, NOT and NOT IN. They are found on the Filters section of the **View Results Online** page.



In order to combine filters into a compound filter, you must first have created individual simple or auto filters. To create a compound filter, first choose a filter name. You must then construct a logic statement using the desired simple filters and conditions you would like to include (see below). Once combined, your simple filters can be saved here as compound filters.





To combine two or more simple filters, use the **AND** operator. As a result, you will be able to view data for respondents that meet multiple criteria/conditions.

- *Example: Age 18-25 **AND** Males*

Use the **OR** operator to evaluate two or more simple filters. As a result, you will be able to view data for responses that meet one OR the other criteria/conditions.

- *Example: New York **OR** New Jersey OR Connecticut*

*Use the **NOT** operator to exclude data. This operator may also be used in conjunction with the* AND or OR operators to exclude data based on multiple conditions. As a result, data is returned which DOES NOT meet the NOT conditions used in this filter.

- *Example: Owns a home AND **NOT** Married*

Use the **NOT IN** operator to select ALL records that are NOT in an existing filter.

NOT vs. NOT_IN

When a filter selection is preceded by “NOT”, the results returned will be records where the selected filter condition is not true (the filter’s questions were answered and do not match). A filter preceded by with “NOT_IN” selects all records that weren’t selected by the filter whether the underlying questions were answered or not.

For example, a filter such as “Country: United States” may be defined to select all respondents who indicated they live in the United States in question 10. A compound filter for “NOT [Country: United States]” selects all respondents who answered question 10 with a response other than United States. A compound filter for “NOT_IN [United States]” selects all respondents who are not included in the filter [United States] regardless of whether or not they answered question 10. Therefore, if the survey contains 100 respondents and 90 selected United States in question 10, then there will be 10 respondents in the filter “NOT_IN [Country: United States].”

Use the open parenthesis operator “**(“**to begin grouping multiple simple filters together. You must use close parenthesis “**)**” to close the group. The expression contained inside the parenthesis will be evaluated before any operators outside

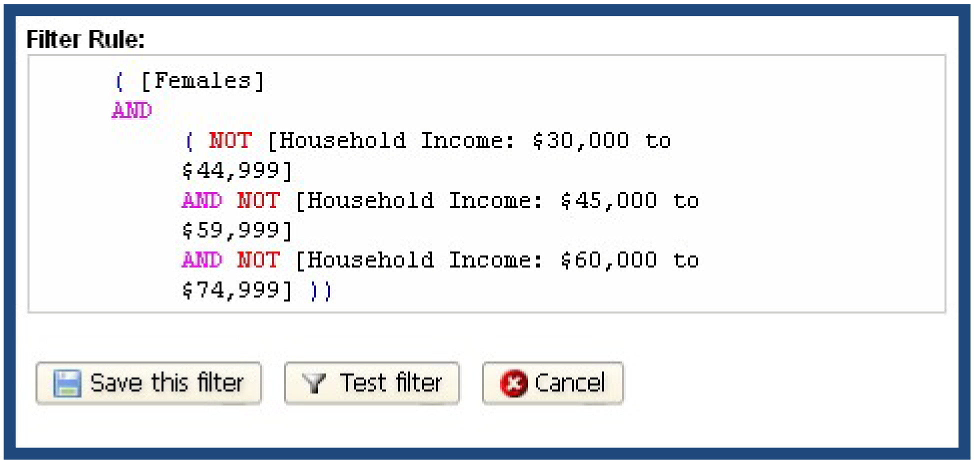
- *Example: Travels frequently OR **(**Planning a vacation AND Infrequent traveler**)***

Use the **((** operator to begin a group which will contain additional groups/subgroups within it. You must use either **))** or **)expression)** to close this group. The expression(s) contained within the innermost parenthesis will be evaluated before expressions that are part of the outer group. As a result, data will be returned when the grouped condition(s) and/or the additional conditions of this filter have been met.

- *Example: Age 25-34 OR **((**High school student OR College student) AND Employed full time**))***

- *Example: **((**California OR New York) AND Female AND (Cell phone user OR PDA user**))***

Once you create your compound filter, you will see the logic statement in the **Filter Rule** box. This display will allow you to read how you have set up your filter and confirm that it is correct. You will be notified if a parenthesis is missing or if any of the logic is incorrect.



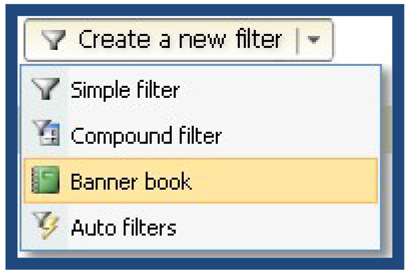
You may also test your filter by clicking on the **Test filter** button. You will then receive a notice of how many records are in the filter you are creating. This notice may be able to indicate whether you are setting up your filter incorrectly, especially if you expect to see a specific number of records for the filter that you just created.

Once the **compound filter** has been saved, you will be sent back to the filters page of the survey where you can view the current counts of the filter. You can also edit the criteria for the filter at any time by clicking on its name.

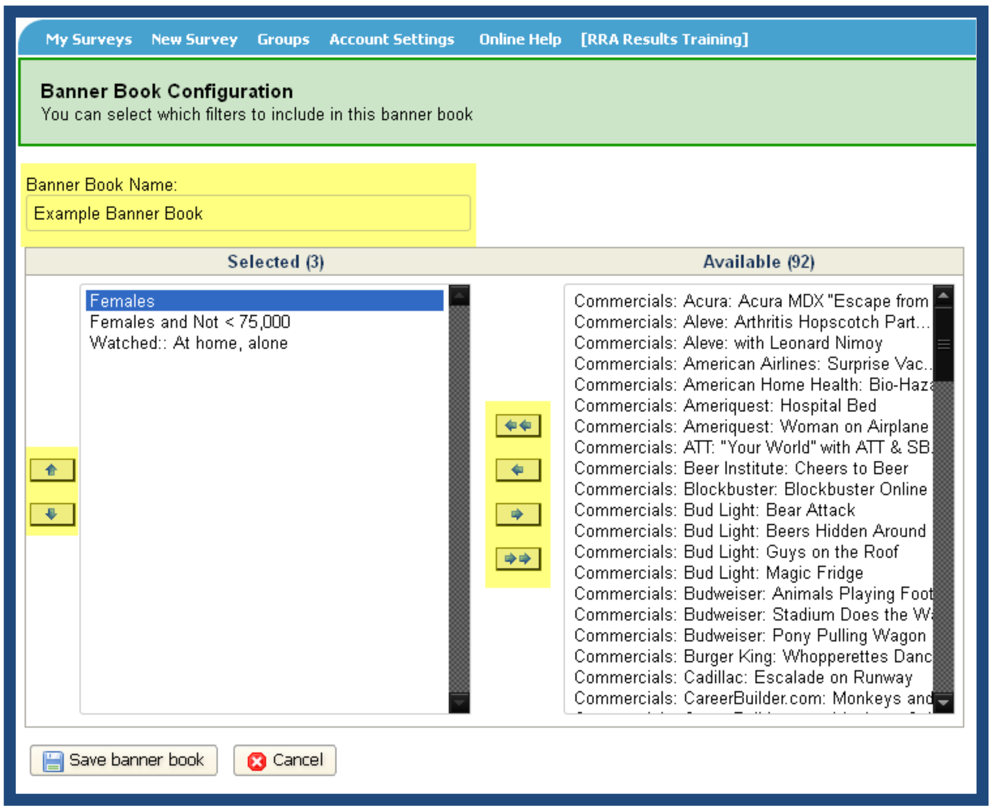
d. Banner Books

Banner Books can be built to help organize your filters and give you the ability to see the same view of your filters each time you pull your results. Please note that Banner books are a tool to view filters only. All filters added to a **Banner Book** will still be viewed independent from one another.

To create a **Banner Book**, select this option from 'Create a new filter' dropdown list:



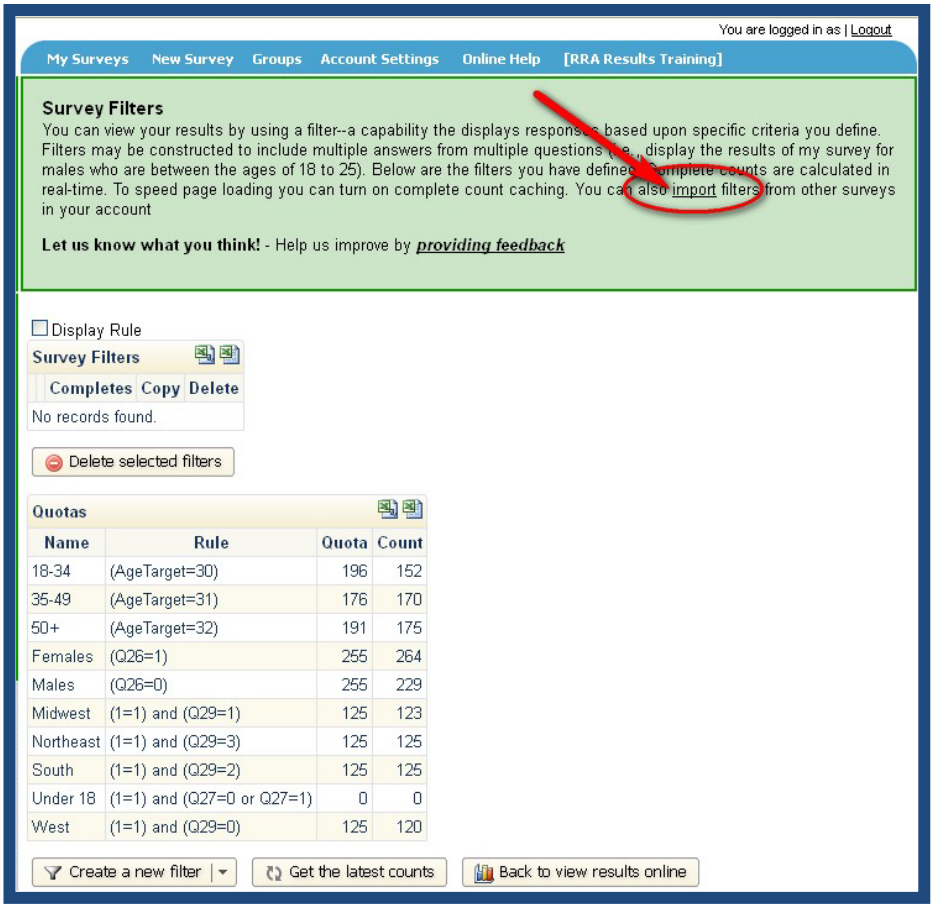
Name your new **Banner Book**, then, highlight the **Available filters** on the right hand side and use the arrows to move them to the **Selected Filters** columns.



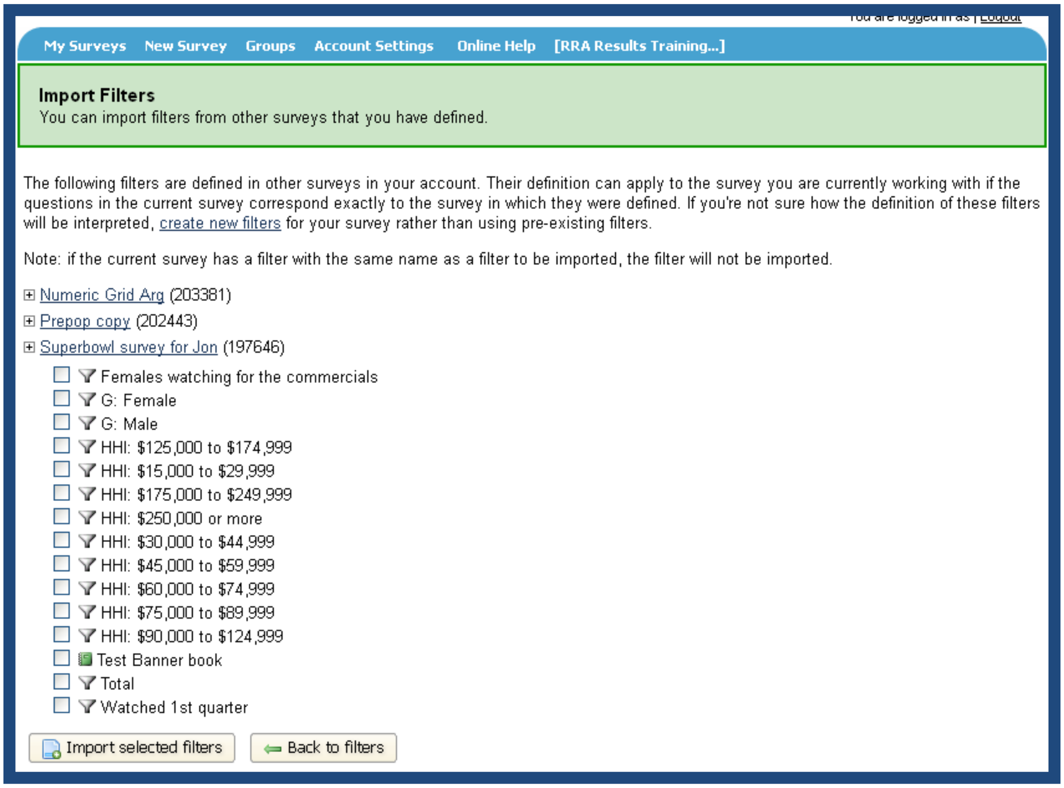
Once you are satisfied with the order, click **Save banner book**. For more information on how to view your results with a Banner Book, please refer to **Selecting Banner Books** on page **155** .

e. Importing filters

Along with building filters from scratch, you can also import filters from existing surveys in **your account** by clicking on the **import** hyperlink in the green Survey Filters box.



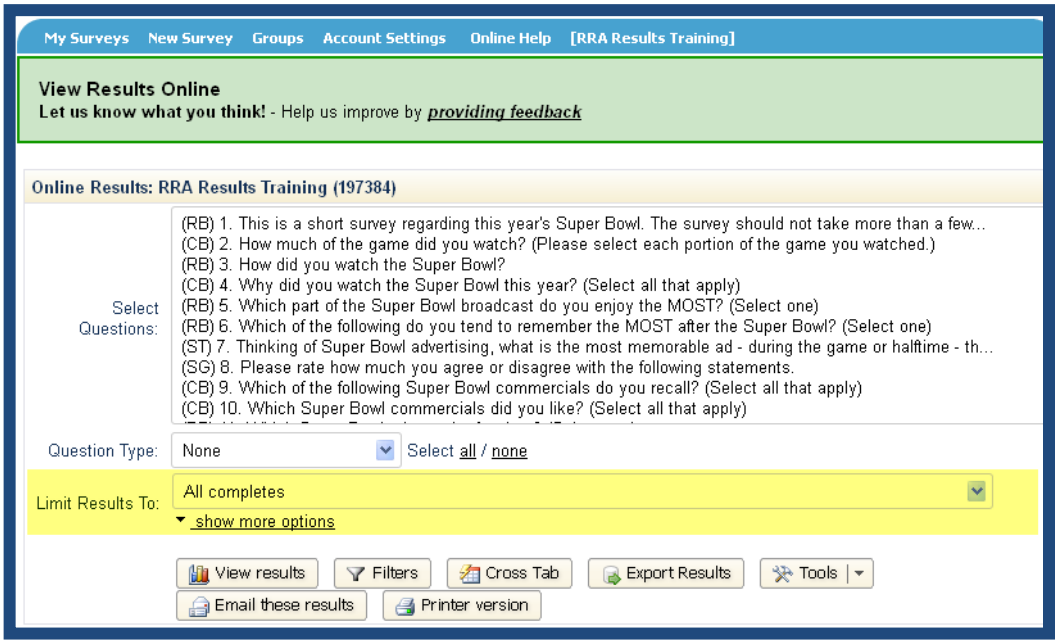
Every survey that has fielded and that you have created filters within will be shown on the next page. From here, you can click on the name of the survey you wish to import filters from. Please note that if the original survey is not identical to the newly fielded survey, you will have to adjust the filter criteria to match the correct question numbers and response rows in order to have an accurate reading of the filters.



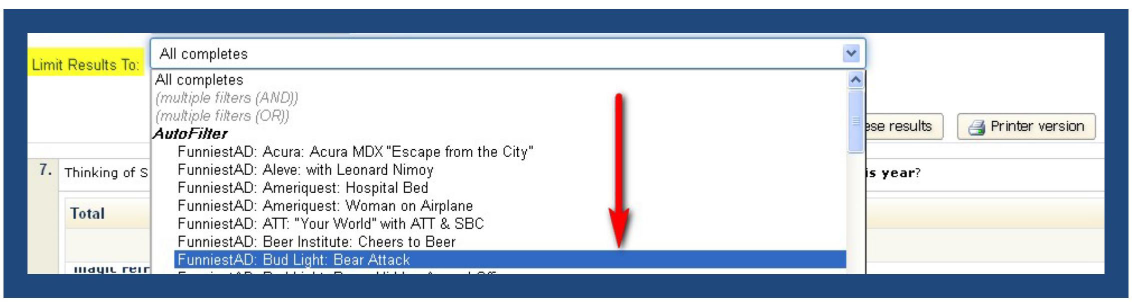
3. LIMITING RESULTS BY FILTER AND SHOWING MORE OPTIONS

a. Selecting Filters

Additional options for viewing you results can be found in one of two ways: by choosing a specific filter in the **Limit Results to** dropdown or by selecting the filters and quota segments you wish to view from the **Show more options** link.



Limit Results to: This option can be found underneath the questions drop down list when selecting the question results you wish to view online. The **Limit Results to** drop down will contain a list of all filters you have created for this data, as well as any quotas that were fielded in your data. By default, this dropdown list will be set to show "All completes" (please see section page **139** if you wish to build filters within your results):



While viewing the results online, the questions will be labeled with the filter you are currently viewing the data of:

2. How much of the game did you watch?
(Please select each portion of the game you watched.)

AutoFilter:FunniestAD: Bud Light: Bear Attack

	Total	
Response	N	%
Total	25	100.000
Pre-Game	13	52.000
1st Quarter	18	72.000
2nd Quarter	18	72.000
Halftime	16	64.000
3rd Quarter	18	72.000
4th Quarter	19	76.000
Post Game	10	40.000
Not Sure	2	8.000

Show more options: You can also view the results based on several different filters or quotas at the same time by clicking on the **Show more options** link beneath the **Limit results to** dropdown. Once this link is opened, you will see all the filters and quotas that were created within this survey. There are small checkboxes that can be selected to the left of each filter and/or quota. By default, 'All completes' will always be checked off. *When applying several filters to the data in this regard, please note that you will read each filter as a separate entity, rather than as a compound segment of data.*

2. How much of the game did you watch?
(Please select each portion of the game you watched.)

Default

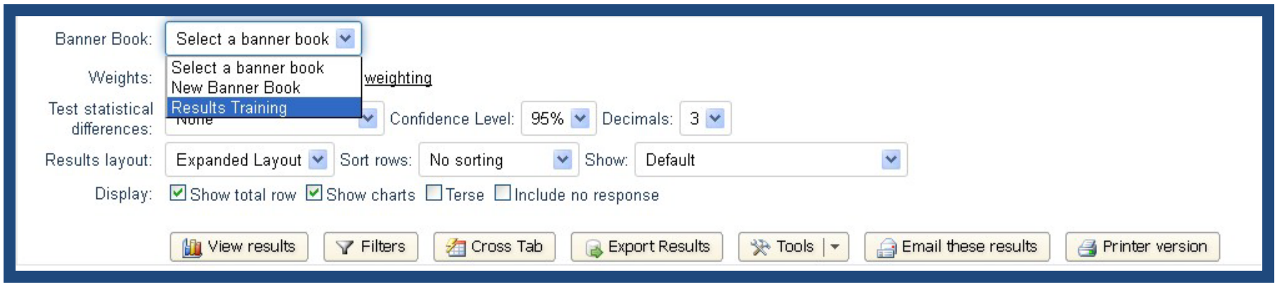
	Total		18 to 24 or female or watched sb alone		Home alone or in bar	
Response	N	%	N	%	N	%
Total	507	100.000	327	100.000	35	100.000
Pre-Game	184	36.292	118	36.086	12	34.286
1st Quarter	375	73.964	239	73.089	27	77.143
2nd Quarter	380	74.951	239	73.089	31	88.571
Halftime	320	63.116	213	65.138	26	74.286
3rd Quarter	380	74.951	246	75.229	28	80.000
4th Quarter	405	79.882	261	79.817	29	82.857
Post Game	169	33.333	104	31.804	10	28.571
Not Sure	22	4.339	15	4.587	1	2.857

As you can see from the image above, the data of each filter that was selected will be shown as its own separate column.

b. Selecting Banner Books

When you create filters, you have the option to create a banner book. Please refer **Creating Banner Books** on page **149** for more information on how to create a banner book.

Once on the **View Results Online** page you are able to select the banner book that was created.



Viewing the banner book will appear as follows:

2. How much of the game did you watch?
(Please select each portion of the game you watched.)

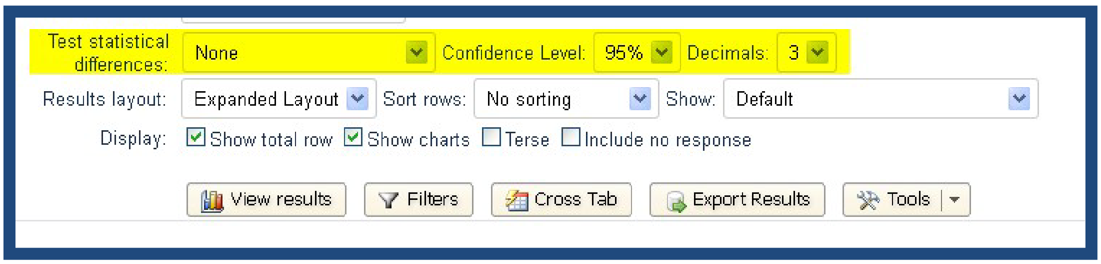
Default

	Home alone or in bar		Watched: At home, alone	
Response	N	%	N	%
Total	35	100.000	78	100.000
Pre-Game	12	34.286	22	28.205
1st Quarter	27	77.143	57	73.077
2nd Quarter	31	88.571	57	73.077
Halftime	26	74.286	46	58.974
3rd Quarter	28	80.000	63	80.769
4th Quarter	29	82.857	64	82.051
Post Game	10	28.571	23	29.487
Not Sure	1	2.857	4	5.128

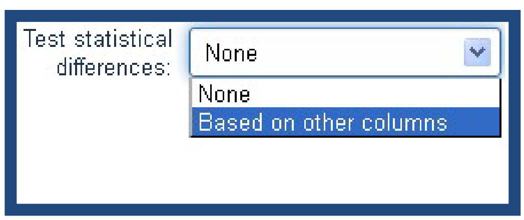
All filters that were added to the banner book selected will be shown as its own column with breakdowns within the data.

c. Test Statistical Differences (Stat Testing)

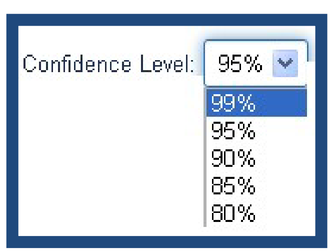
Stat Testing allows you to compare two independent variables (filters) against one another in order to determine whether or not the results are likely to have resulted by chance alone. You can choose to turn on this feature when multiple filters are applied to your results. You may also access this feature from the **Cross Tab** page.



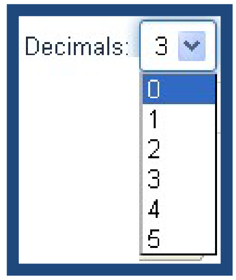
After selecting the filters you wish to compare, the next step is to turn on Stat Testing. Start with the drop down box next to **Test statistical differences**. By default, the dropdown will be 'None'. To change this, select 'Based on other columns' from the list, as all data within a specific filter will be represented within a unique column:



The next step is to define the **confidence level.** This is the interval in which a measurement or trial falls corresponding to a given probability. You can select confidence intervals of 80%, 85%, 90%, 95% or 99%. By default, the **confidence level** will be set to 95%.



Last, you are able to choose the number of **decimals** you would like your data to be rounded to. By default, the data will be rounded to three decimal places.



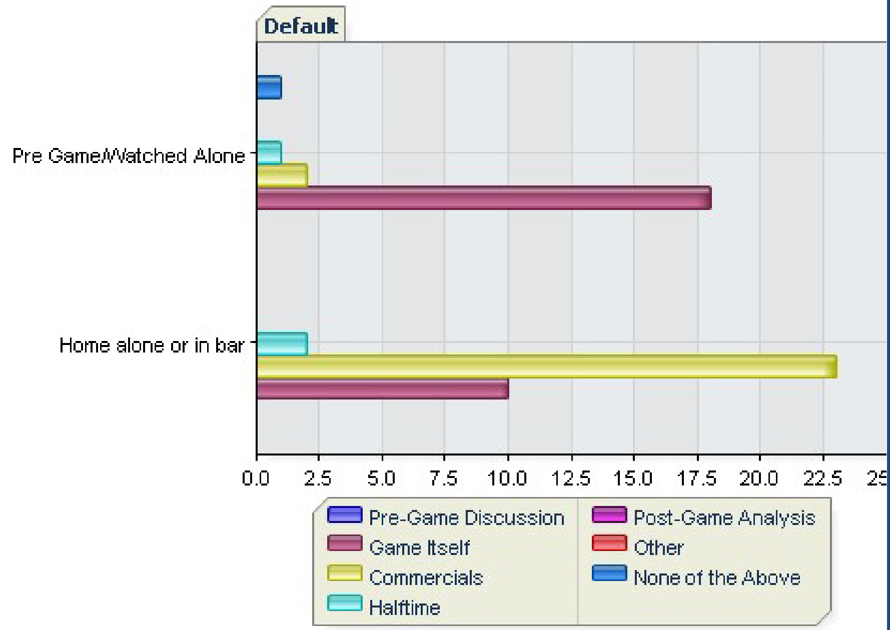
As shown below, each independent column (filter) will have a letter associated with it. This letter will appear in a corresponding column if there is a significant difference between the two independent variables.

5. Which part of the Super Bowl broadcast do you enjoy the MOST? (Select one)

Default

	Home alone or in bar (A)			Pre Game/Watched Alone (B)		
Response	N	%	Sig Dif	N	%	Sig Dif
Total	35	100.000		22	100.000	
Pre-Game Discussion	0	0.000		0	0.000	
Game Itself	10	28.571		18	81.818	A
Commercials	23	65.714	B	2	9.091	
Halftime	2	5.714		1	4.545	
Post-Game Analysis	0	0.000		0	0.000	
Other	0	0.000		0	0.000	
None of the Above	0	0.000		1	4.545	

chi-square p-value = 0.0037, df=6



For the response ‘Game Itself’, column A tested significantly higher than column B at the 95% confidence level, where as in the response row ‘Commercials’, column B tested significantly higher than column A.

*__*Please note__: When viewing an "All completes" or "total" column, there will not be a letter associated because the total contains all respondents and therefore is not independent from any sub segment of the data.*

The **chi-square** test is used to determine if responses are statistically different among subgroups. This test looks at the data for all of the answer sets to determine if there is an overall difference among the subgroups (in the case below the subgroups are Males and Females).
If there is an overall difference, the chi-square test will then evaluate whether or not there is a significant difference for each answer set and display the related column letter of the subgroup. However, if no overall difference is found amongst the subgroups, the following chart will be shown.

Default

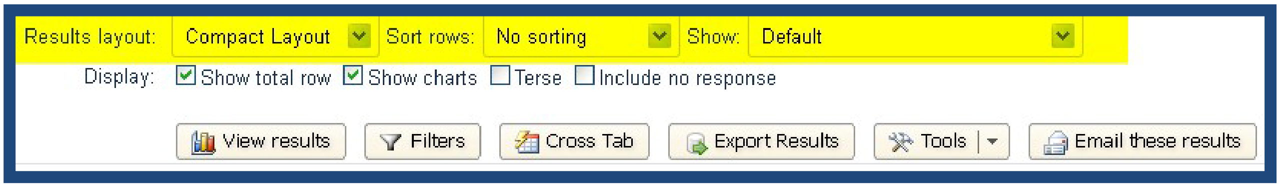
	Total		Females		Males	
Response	N	%	N	%	N	%
Total	**507**	**100.000**	**264**	**100.000**	**228**	**100.000**
Pre-Game	184	36.292	92	34.848	87	38.158
1st Quarter	375	73.964	187	70.833	188	82.456
2nd Quarter	380	74.951	188	71.212	192	84.211
Halftime	320	63.116	173	65.530	147	64.474
3rd Quarter	380	74.951	193	73.106	187	82.018
4th Quarter	405	79.882	206	78.030	199	87.281
Post Game	169	33.333	84	31.818	74	32.456
Not Sure	22	4.339	14	5.303	8	3.509

* Pair-wise statistical testing has been disabled because overall chi-squared test is not significant. (chi-square p-value = 1.0000)

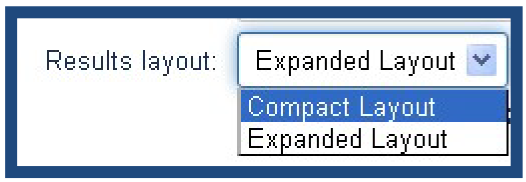
The chi-squared test allows for a higher confidence in the significant differences that are identified.

d. Results Layout

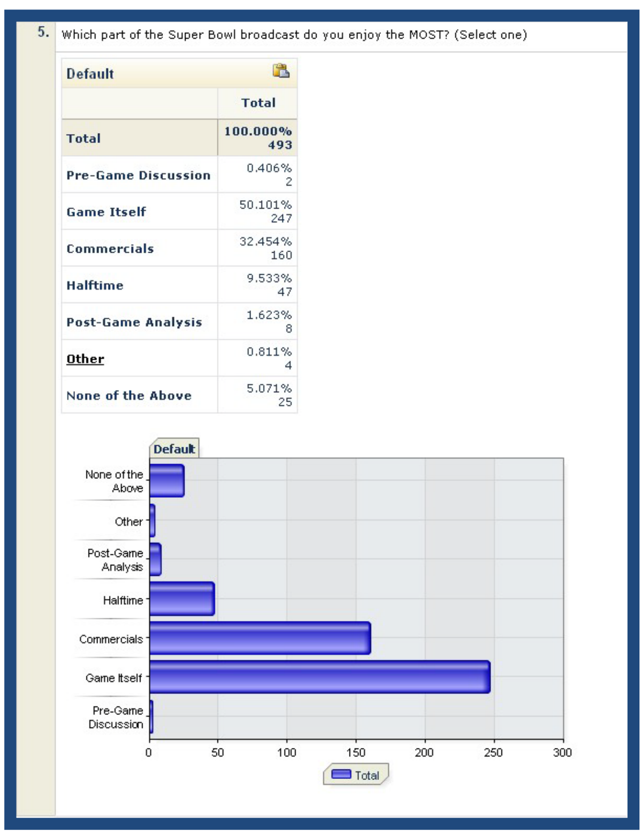
There are several changes you can make to how you view the data online:



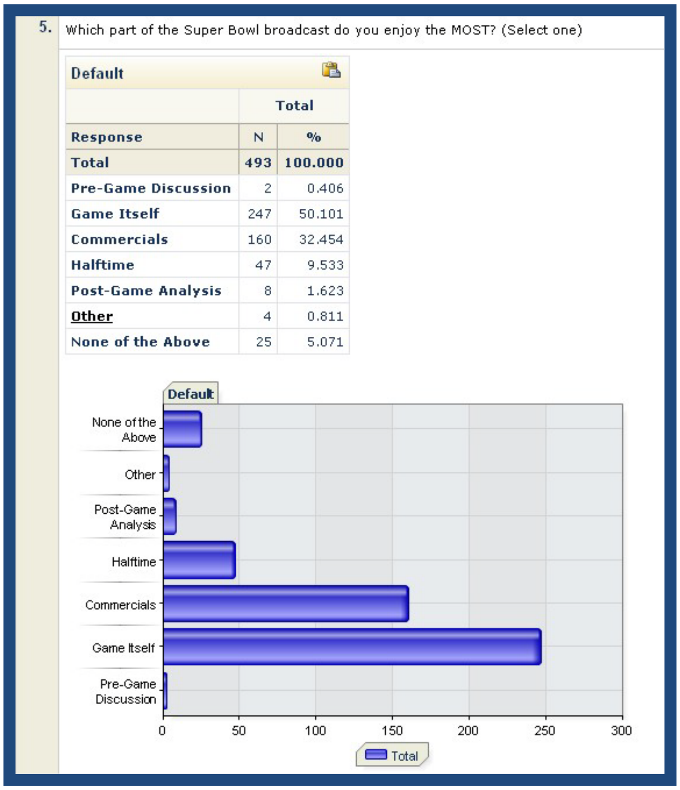
When viewing your results online, you can choose to view the data in a **Compact Layout** or in an **Expanded Layout.**



Compact Layout: Shows the percents and the counts within one column in the chart, when counts and percents are selected as an option.

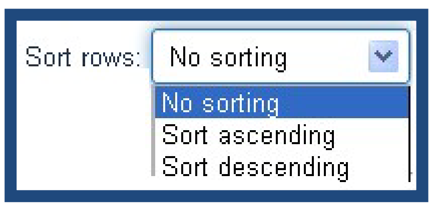


Expanded Layout: Separates the percents and the counts in their own columns, when counts and percents are selected as an option.



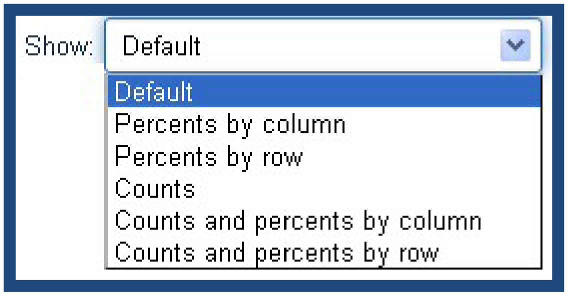
	Total	
Response	N	%
Total	493	100.000
Pre-Game Discussion	2	0.406
Game Itself	247	50.101
Commercials	160	32.454
Halftime	47	9.533
Post-Game Analysis	8	1.623
Other	4	0.811
None of the Above	25	5.071

The **Sort rows** feature allows you sort each question's data in several different ways:



Ascending order: Will display the results where the total counts go from smallest to largest.
Descending order: Will display the results where the total counts go from largest to smallest.
No Sorting: Will display responses in the order in which it was built into the survey.

The **Show** dropdown list allows you to specify how you would like to view the "total" columns for each question you choose to view the results of online.



Percents by column: Shows the percents against the column total.

Percents by row: Shows the percents against the row total.

Counts: Shows only the counts.

Counts and percents by column: Shows the counts as well as the percents against the column total.

Counts and percents by row: Shows the counts as well as the percents against the row total.

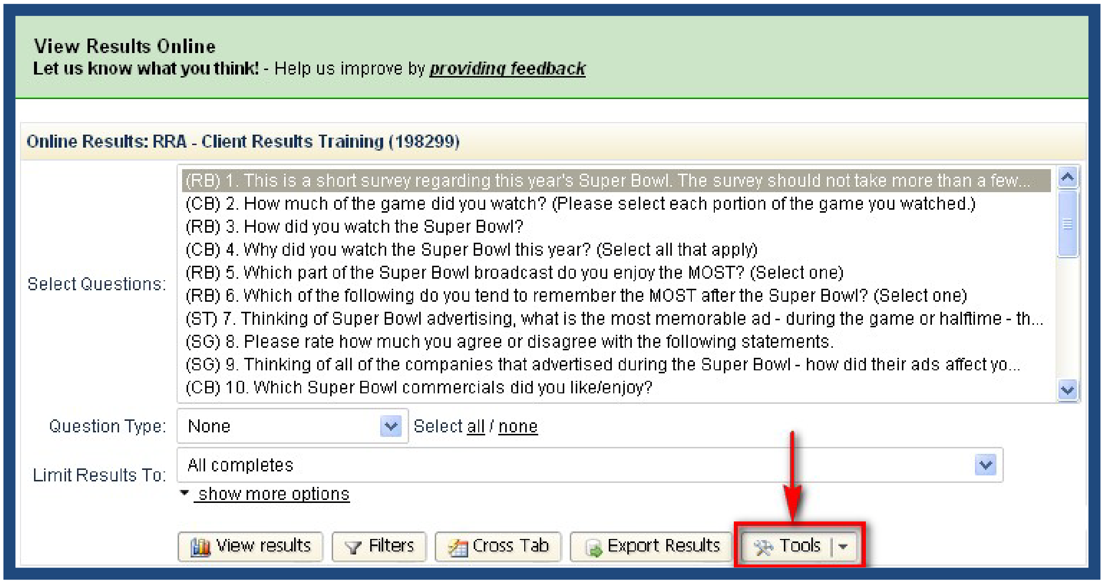
e. Display

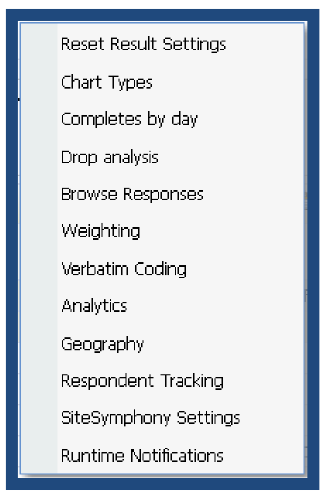
Several display options can be checked to apply them to the data, or left unchecked:

Show total row: Includes an additional row for total counts.
Show charts: Shows charts for each question being viewed.
Terse: Removes the rows where the total number of responses is zero.
Include no response: Includes those respondents who did not answer the question.

4. TOOLS MENU

In addition to the other reporting options, there are some helpful tools that can assist in viewing your results online.





a. Reset Results Settings

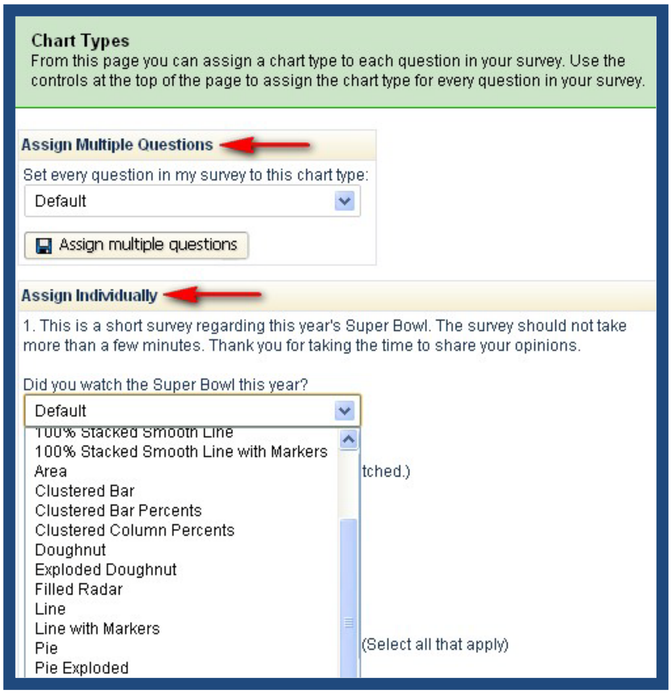
Reset Result Settings allows you to remove all of the reporting options that you have applied to the questions in your survey. This setting will delete all webpage cache and will show the results as if you were looking at them for the first time. Please note that Resetting your Results

will **not** delete any filter you have created in the survey, although you will need to check them off again under the 'Show more options' link in order to view them within the online results:

b. Chart Types

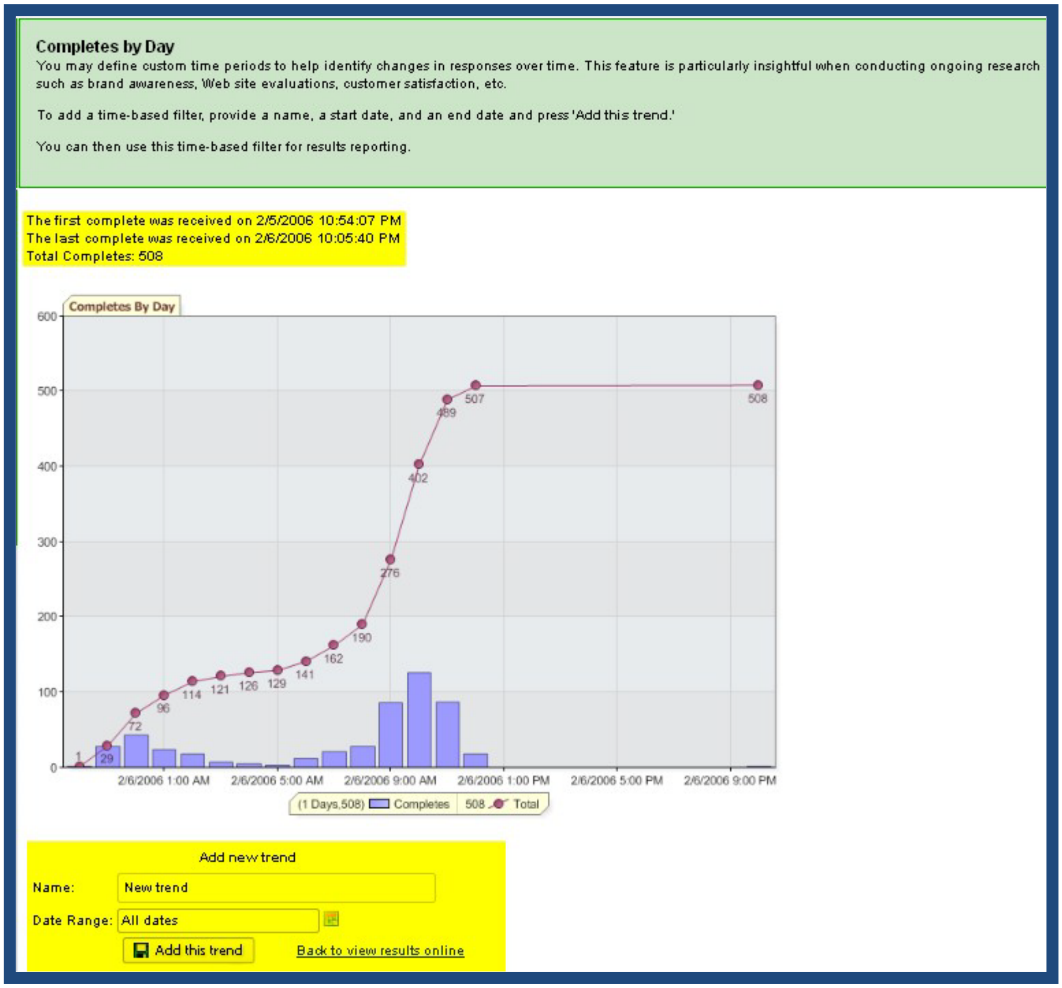
Chart Types allows you to define the chart types for your questions. You can either select one chart for all questions or go through each question individually and select a different chart.

You can either select one chart for all questions or go through each question individually and select a different chart.



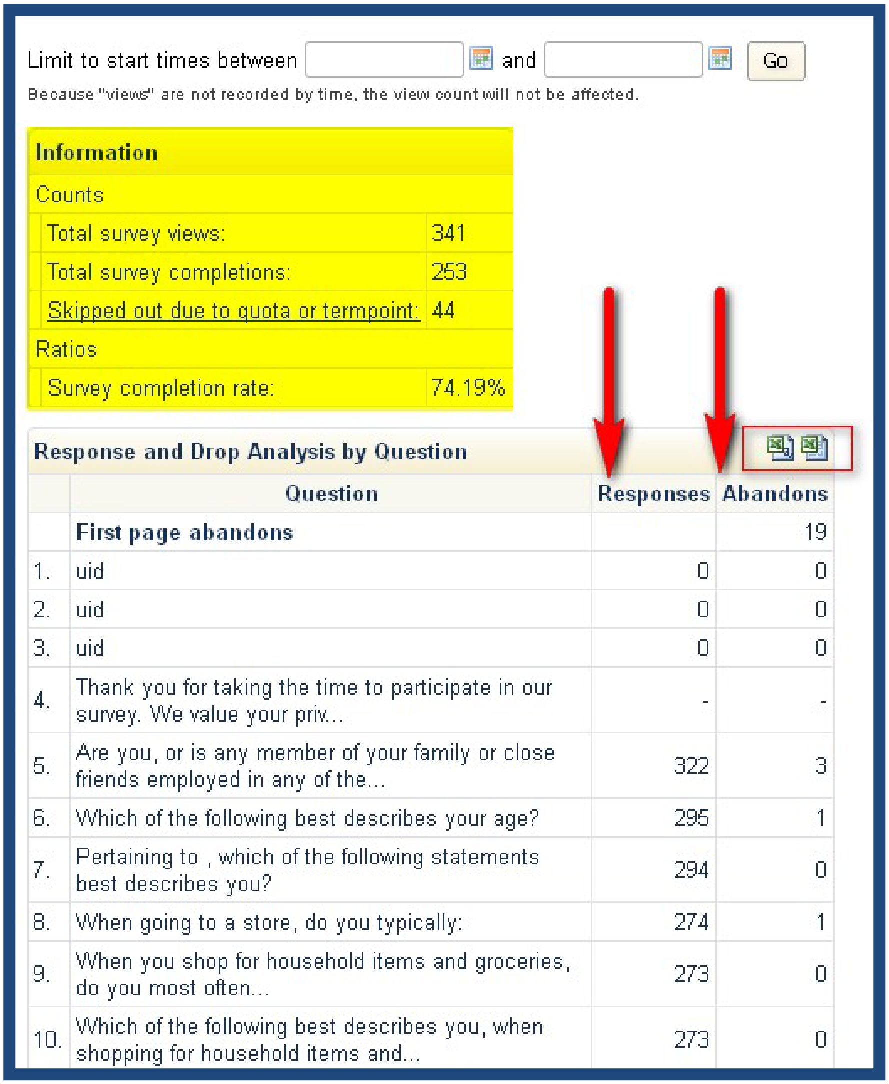
c. Completes by Day

This tool allows you to view the number of completes your survey received on a daily basis. You will be able to view a chart of when respondents completed your survey over the course of its fielding time.
You may also examine trends to see how many completes your survey received within a specific date range. By selecting dates and **Adding this Trend**, you can create a filter that can be used on the **View Results Online** page.



d. Drop Analysis

This tool provides a breakdown of when respondents abandoned the survey before completion. It is particularly helpful in determining which questions may be causing respondents to exit the survey. Although you are unable to make an edit to a survey that is already live, you can keep this information in mind for future surveys.



Limit to start times between [ ] and [ ] Go

Because "views" are not recorded by time, the view count will not be affected.

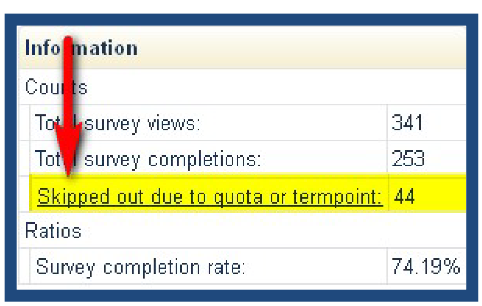
Information	
Counts	
Total survey views:	341
Total survey completions:	253
Skipped out due to quota or termpoint:	44
Ratios	
Survey completion rate:	74.19%

Response and Drop Analysis by Question

	Question	Responses	Abandons
	First page abandons		19
1.	uid	0	0
2.	uid	0	0
3.	uid	0	0
4.	Thank you for taking the time to participate in our survey. We value your priv...	-	-
5.	Are you, or is any member of your family or close friends employed in any of the...	322	3
6.	Which of the following best describes your age?	295	1
7.	Pertaining to , which of the following statements best describes you?	294	0
8.	When going to a store, do you typically:	274	1
9.	When you shop for household items and groceries, do you most often...	273	0
10.	Which of the following best describes you, when shopping for household items and...	273	0

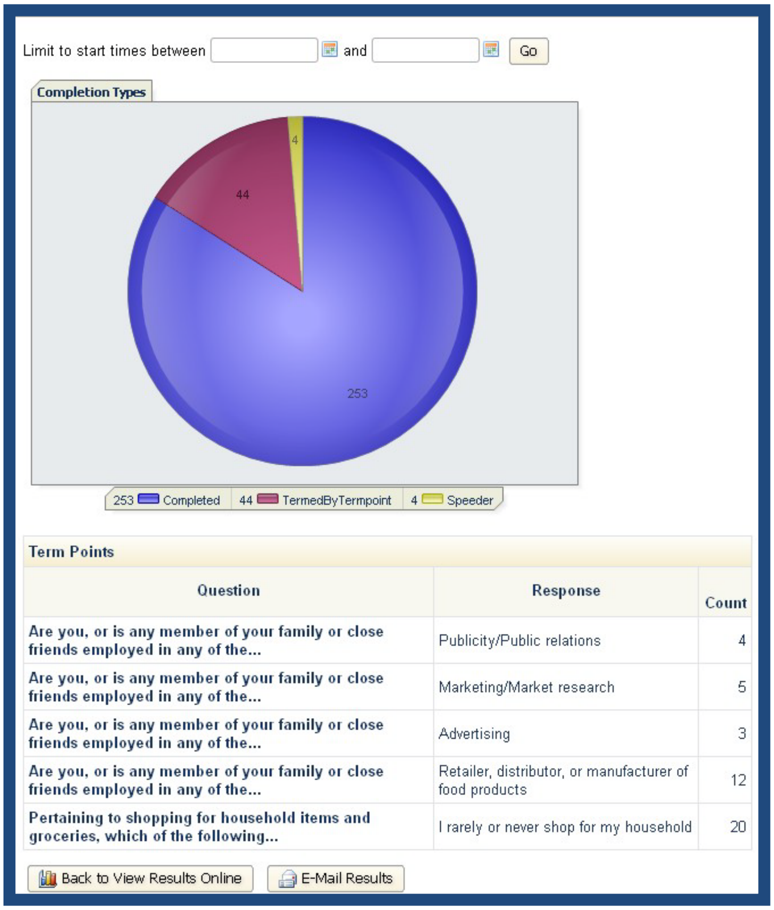
To export your Drop Analysis into Excel, select the icon in the upper right corner of the chart. Please note that this analysis is an estimate; skip patterns, selective question presentation and other complex features will impact the accuracy of the Drop Analysis Report.

If your survey contains quotas or termpoints, clicking on the **"Skipped out due to quota or termpoint"** link will allow you to view the statistics on where respondents are being terminated from your survey:



Information	
Counts	
Total survey views:	341
Total survey completions:	253
Skipped out due to quota or termpoint:	44
Ratios	
Survey completion rate:	74.19%

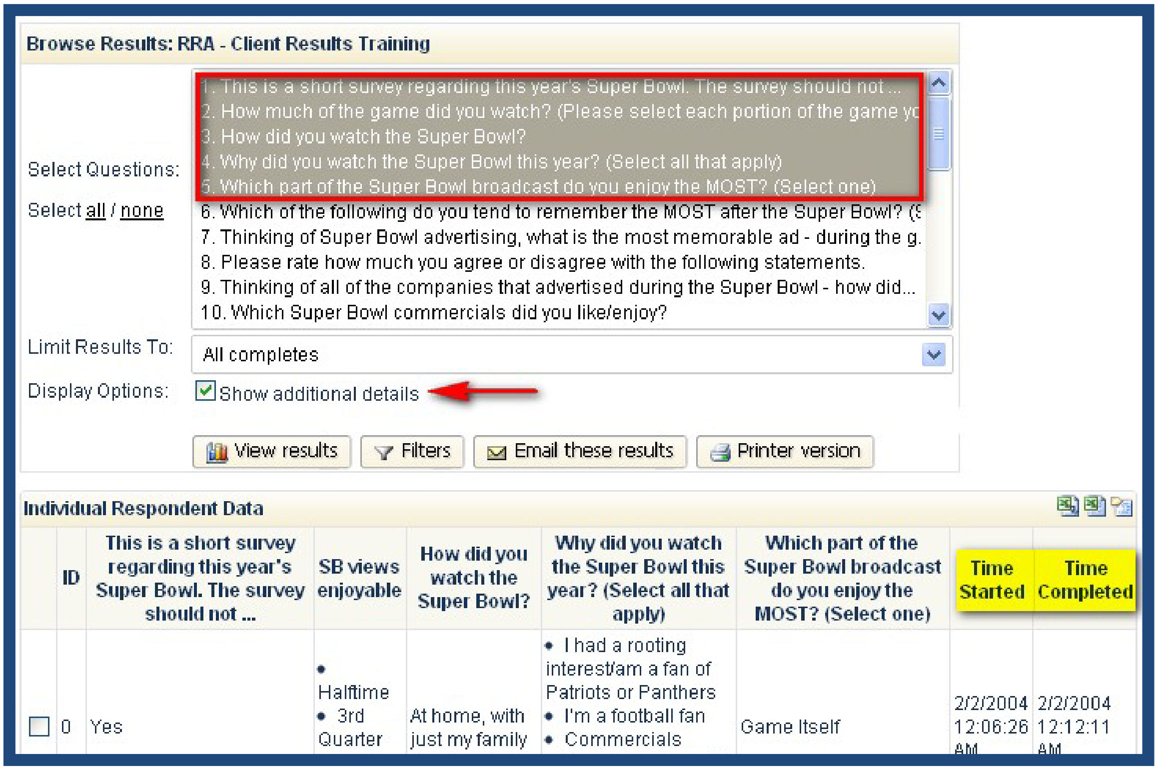
On this **“Termination** Analysis” page, you will view a detailed chart which shows you what questions are terminating (or “quota-ing”) respondents in the survey. You can e-mail these results to yourself or return to the **View Results Online** page.



e. Browse Responses

Browse Responses allows you to view the data of individual respondents as well as delete specific respondent data.

You have the option to select a specific question or multiple questions. However, if you would like to view responses by filter/banner book, simply select through the “**Limit Results to:**” option.



By checking off **Show additional details** you can view the start and complete time for each respondent, based on Eastern Standard Time.

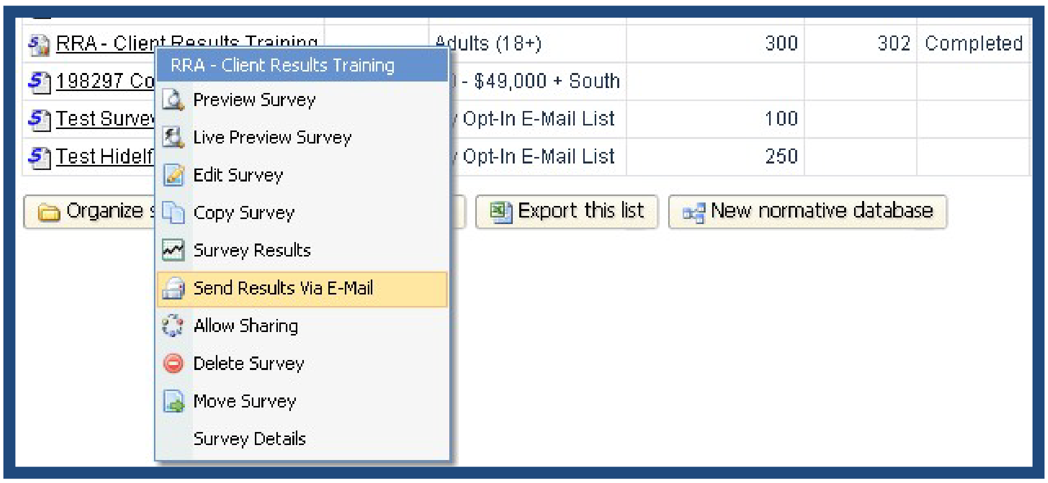
Scrolling to the bottom of the **"Browse Responses"** page will allow you to create filters based off of an individual or a set of individuals, as well as delete test results or erroneous respondent data.

*__*Please note:__ You cannot delete selected question data for individuals, as you are only able to delete whole respondents/individuals or keep all of their data in the results database.*

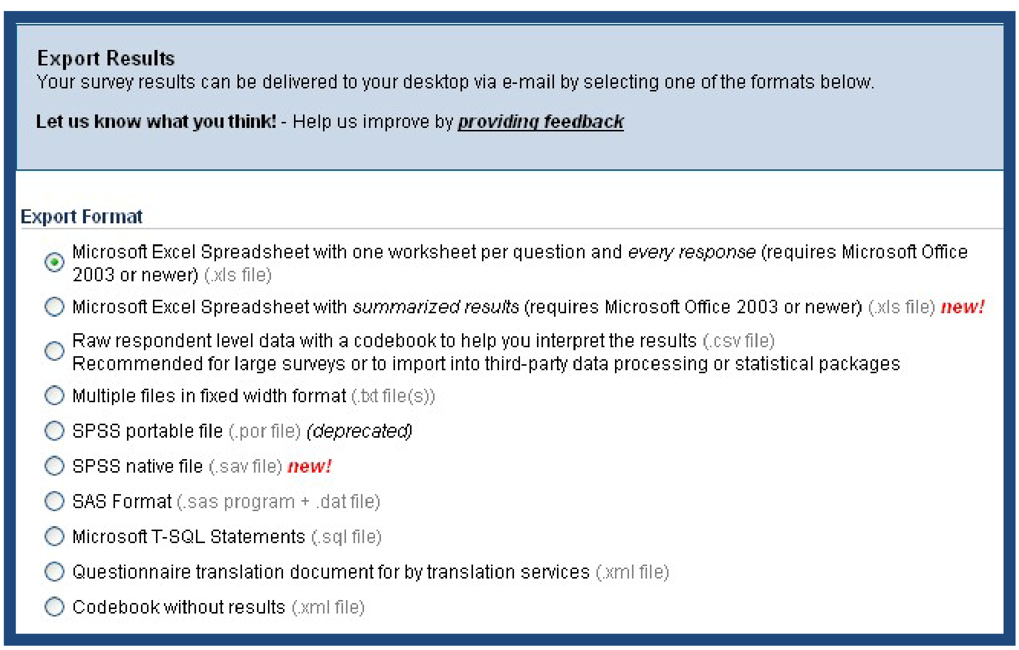
5. EXPORTING/EMAILING RESULTS

You have the option to elect specific subsets of your data, or questions within your data exported and delivered to your desktop via email in Microsoft Excel, CSV, Fixed Field Output, SPSS Portable Document Format, SAS Format or an xml file.

You can access the Export Results section from the **My Surveys** page by clicking on the survey name and choose **Send Results Via E-Mail** form the menu.



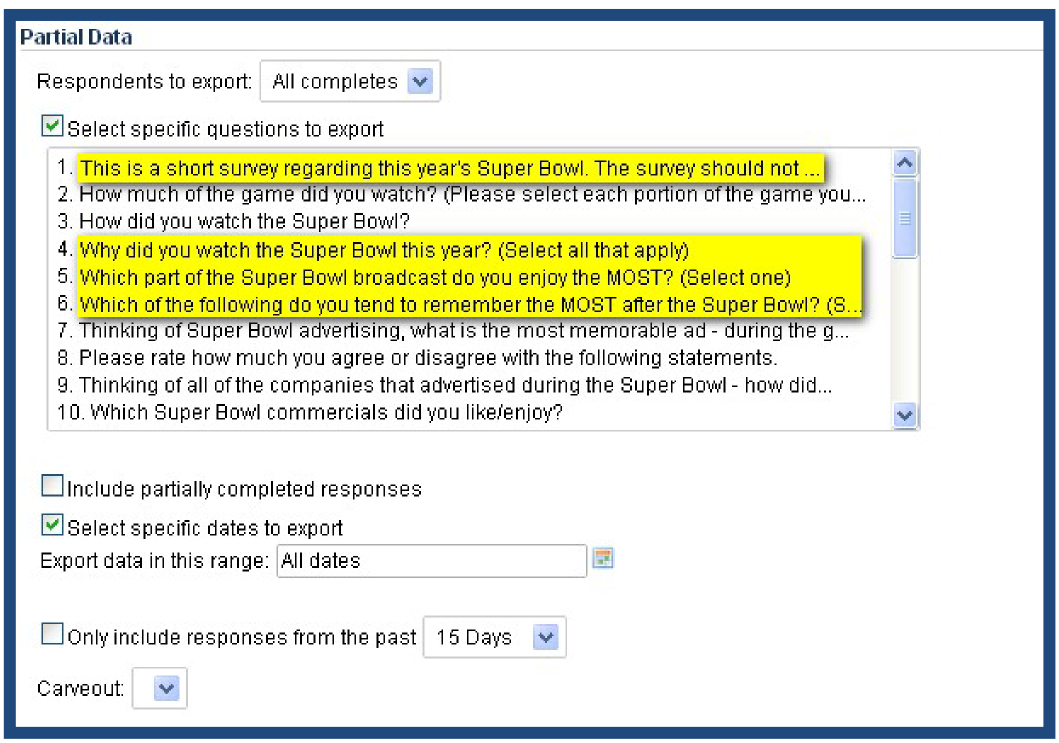
First, select the **Export Format** that you would like to receive your survey results. The first three format options are most common.



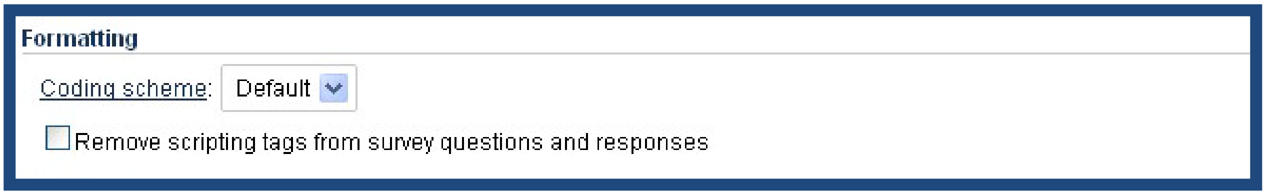
Delivery: You may choose to email your results or upload them to an ftp site. If you'd like to email them, you are able to adjust the subject line and enter additional email addresses.

Please Note*: Attached results will be sent as a compressed (.zip) file unless otherwise specified within the **Data Files section.*

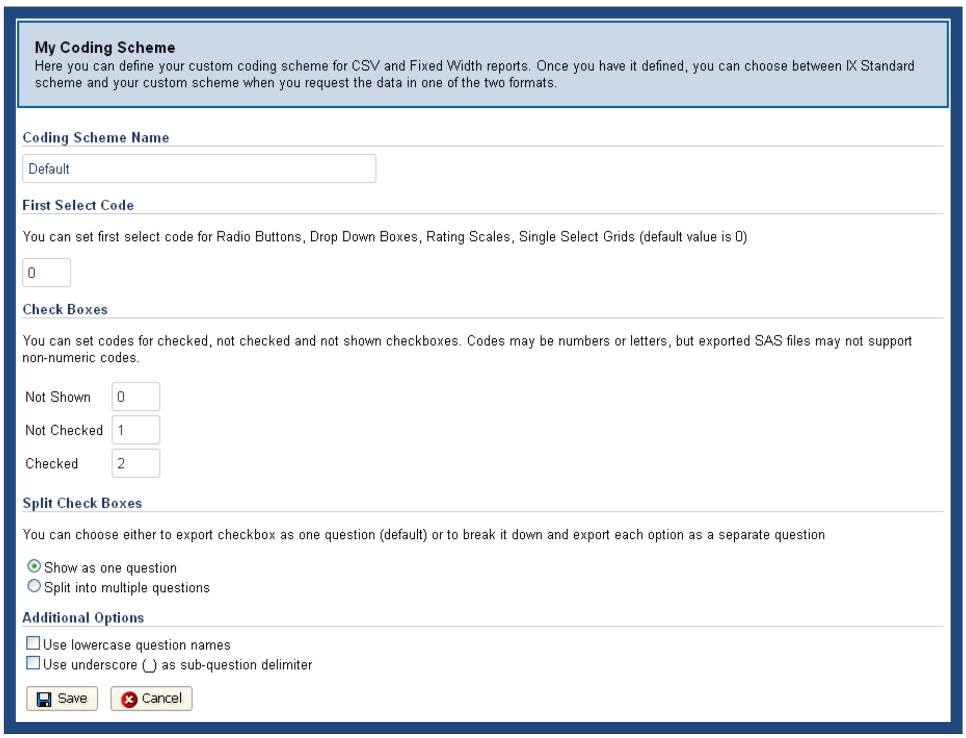
Partial Data: You may request specific information from your survey, such as certain respondents (based on filters already created in the results), specific questions and partially completed responses. In addition, you may look at the results within a specific time frame.



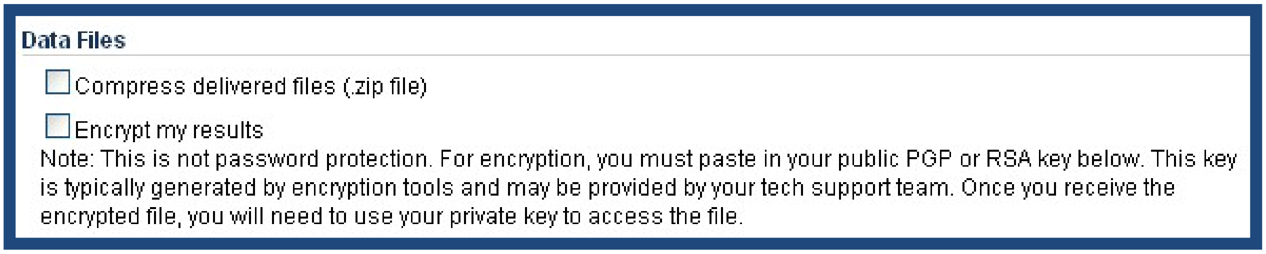
Formatting: You can select a custom coding scheme that you have created or remove any scripting from the survey. Specifically, this option would remove scripting within the question labels to improve readability.



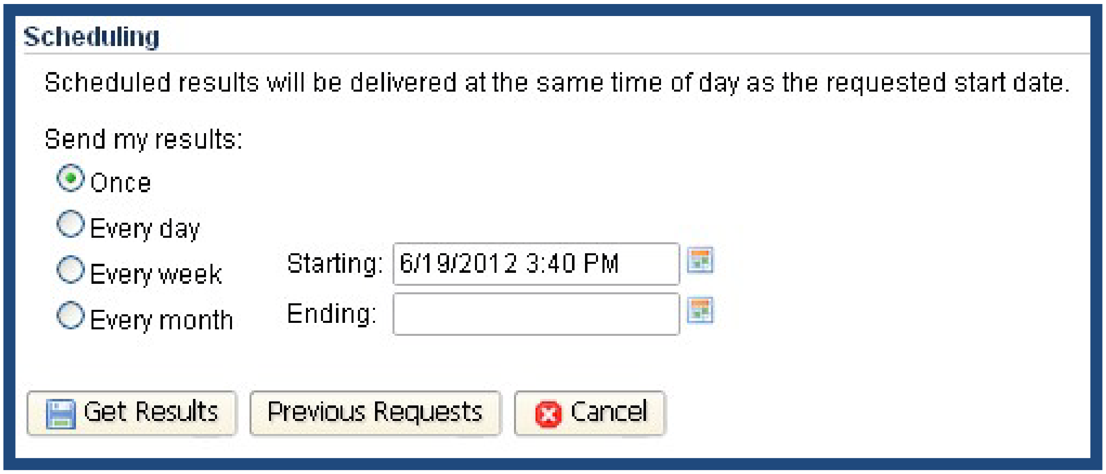
In regards to coding scheme, you have the option to adjust the codes for checkboxes and First Select Codes (the first code in a single select response). First Select Codes start with a zero, but may be adjusted to a 1 here. You may also determine whether checkbox questions are shown in 1 or 2 columns (the default is 1 column).



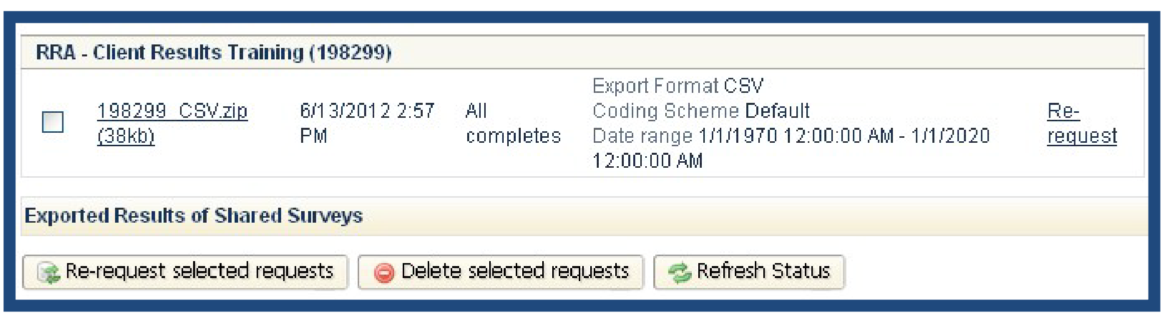
Data Files: By default, the result files will be compressed. However, if the email server you currently use does not support zipped files, be sure to de-select the box labeled **Compress delivered files**. A second option of receiving your export is by downloading directly to your computer; however these files must be zipped.



Scheduling: You have the option to schedule your results for delivery once, every day, every week, or every month. You may also specify a schedule start/end date.

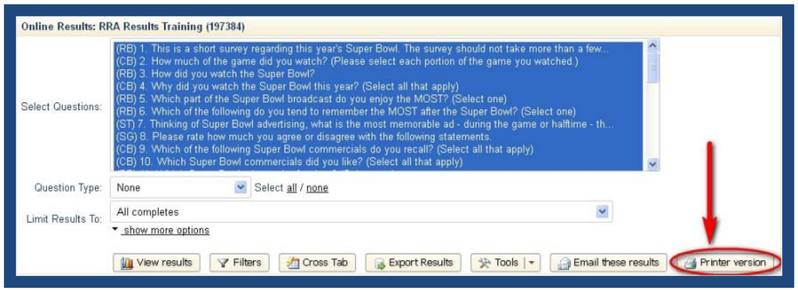


Previous Requests: This option allows you to view all of the previous requests you have had in your account. You will see the survey ID, survey name, processed date, status (completed, pending, errored), and a link to download the file.

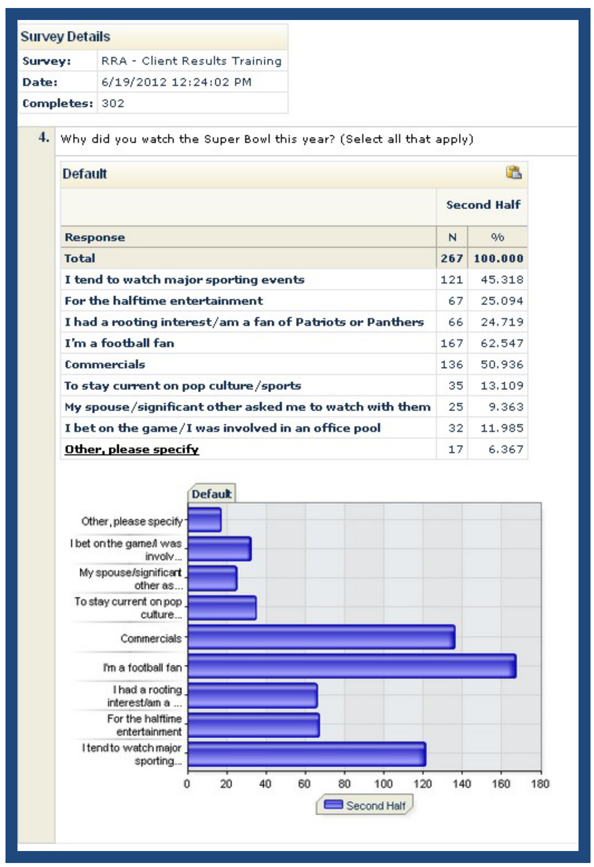


6. RESULTS PRINTER VERSION

The **Printer Version** feature allows you to print the questions that you are currently viewing in a nice printer-friendly format. After selecting the questions you wish to view online, and clicking 'View Results', the **'Printer Version'** tab will appear beneath the question dropdown list:



Below is what the page will look like:



Survey Details

Survey:	RRA - Client Results Training
Date:	6/19/2012 12:24:02 PM
Completes:	302

4. Why did you watch the Super Bowl this year? (Select all that apply)

Default

	Second Half	
Response	N	%
Total	**267**	**100.000**
I tend to watch major sporting events	121	45.318
For the halftime entertainment	67	25.094
I had a rooting interest/am a fan of Patriots or Panthers	66	24.719
I'm a football fan	167	62.547
Commercials	136	50.936
To stay current on pop culture/sports	35	13.109
My spouse/significant other asked me to watch with them	25	9.363
I bet on the game/I was involved in an office pool	32	11.985
Other, please specify	17	6.367